



## DAXUE CONSULTING FOR POLSKA

### CONSUMER RESEARCH ON CHINESE OUTBOUND TRAVELERS – ONLINE SURVEY ANALYSIS

Project Team of Daxue Consulting: Tiange(Grace) Yu 虞天歌, Lei(Jessy) Zhang 张雷, Hanyu Liu 刘汉宇

March-Apr 2023

# Report Outline

## I. Research Objectives & Methodologies

## II. Market Outlook For Chinese Outbound Traveling

- Market overview: pre-covid & 2023 outlook (market size, top destinations)
- China's outbound tourism consumer behavior & trends

## III. Behaviors of CEE (*Central-Eastern Europe*) Travelers

- Traveler profile (demographic x companion)
- Traveling psychographic & behavior (objective & expectations, traveling patterns)

## IV. Perceptions On Poland Among CEE Travelers

- Knowledge & perception towards Poland
- Main attraction themes
- Perceived alternative & complementary destinations for Poland

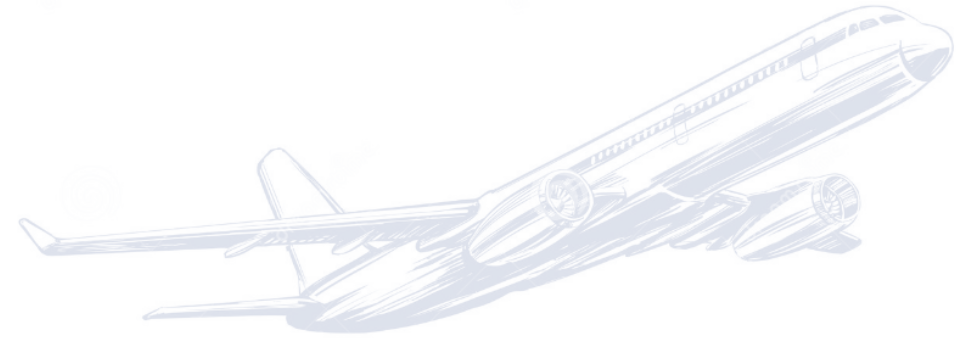
## V. Decision-Making Process & Potential Touchpoint of CEE Travelers

- Initial inspirations & trigger points on outbound destinations
- Pre-trip research & decision-making process (channels, selection criteria)
- Post-trip sharing

## VI. International Tourism Motivations & Preferences of CEE Travelers After Reopening

## VII. Recommendation For PNTA Addressing Chinese Outbound Travelers

- Target persona & pain points
- Competitive differentiation & anchoring with neighboring countries
- Recommended portfolio of tourist attractions in Poland
- Communication strategy



# 01

## RESEARCH OBJECTIVES, METHODOLOGY & SURVEY SAMPLE DISTRIBUTION

# Research Objectives & Methodology

## METHODOLOGIES

- **Market Outlook For Chinese Outbound Traveling**
  - Market overview: pre-covid & 2023 outlook (market size, top destinations)
  - China’s outbound tourism consumer behavior & trends
- **Behaviors of CEE (Central-Eastern Europe) Travelers**
  - Traveler profile (demographic x companion)
  - Traveling psychographic & behavior (objective & expectations, traveling patterns)
- **Perceptions On Poland Among CEE Travelers**
  - Knowledge & perception towards Poland
  - Main attraction themes
  - Perceived alternative & complementary destinations for Poland
- **Decision-Making Process & Potential Touchpoint of CEE Travelers**
  - Initial inspirations & trigger points on outbound destinations
  - Pre-trip research & decision-making process (channels, selection criteria)
  - Post-trip sharing
- **International Tourism Motivations & Preferences of CEE Travelers After Reopening**
- **Recommendation For PNTTO Addressing Chinese Outbound Travelers**
  - Target persona & pain points
  - Competitive differentiation & anchoring with neighboring countries
  - Recommended portfolio of tourist attractions in Poland
  - Communication strategy



- *The survey has been administrated online through a professional panel*
- *Random sampling process against bias*
  - a. *online panels have been invited at different times during weekdays and weekends*
  - b. *online panels have been reached out to and invited through various channels (SMS, forums, blogs, email, WeChat, Weibo, Red, Ctrip, Dianping, Taobao, etc.)*

## Survey Sample Distribution

### Screening Criteria (SURVEY)

- [100%] 20 - 60 years old
- [100%] Living in tier 1 and new tier 1 cities
- [100%] Annual personal income of >150KRMB
- [100%] Key or co-decision maker
- [100%] Confirmed Mid-European traveling experience (from 2017-2019)
- [100%] Outbound travelling for leisure purpose

### Quota Design (SUREVEY)

#### Traveling experience:

- [17%] participants who went to Poland
- [17%] participants who have strong willingness visting Poland in the next 3 years

#### Travel purpose:

- [>20%] Relax
- [>20%] Exploring niche desitinations/activities
- [>20%] Family gathering: family with kids
- [>20%] Shopping

#### City Distribution:

- [70%] Tier 1 cities (BSGS)
- [30%] New tier 1 cities

#### Age Distribution:

- [>35%] 20-35 years old
- [>35%] 36-54 years old
- [>10%] 55-60 years old

# 02

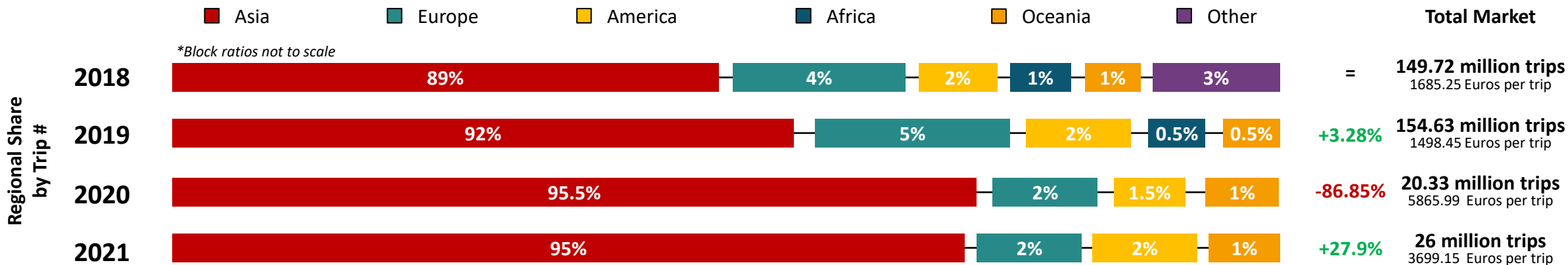
## MARKET OUTLOOK FOR CHINESE OUTBOUND TRAVELING

- 1) China's outbound tourism overview: Pre-covid & 2023 outlook
- 2) Top travel destinations before and after covid
- 3) China's outbound tourism consumer behavior & trends
- 4) Outbound traveler demographics before COVID

CHINA'S OUTBOUND TOURISM OVERVIEW: PRE-COVID & 2023 OUTLOOK

**China's outbound tourism sees a significant rebound in 2023 and is expected to return to the pre-Covid level by 2024; Among destinations, Asia will still be overrepresented in 2023, benefited from *friendlier visa policies & faster resumption of flights*.**

**Regional Share & Average Spend of Outbound Chinese Tourists (2018-2021)**



Exchange rate accessed on 04/25/2023  
1: 0.91 (USD:Euros)

**Major Factors to Impact Chinese Outbound Tourist Destinations in 2023**

**1. Eased VISA application policy**  
 😊  
 Visa services have been gradually recovered, including the simplification of the VISA application documents and the restoration of the application length to 2019. Visa processing queues for many countries are already beyond May, indicating a strong willingness of Chinese tourists to travel out of China.

**2. Accelerated resumption of international flights**  
 😊  
 According to FlightAI market insight data, the number of international flights since February 2023 has recovered to 13.1% of the same period in 2019. Meanwhile, OTAs have developed more diversified outbound travel packages for group travelers to choose from.

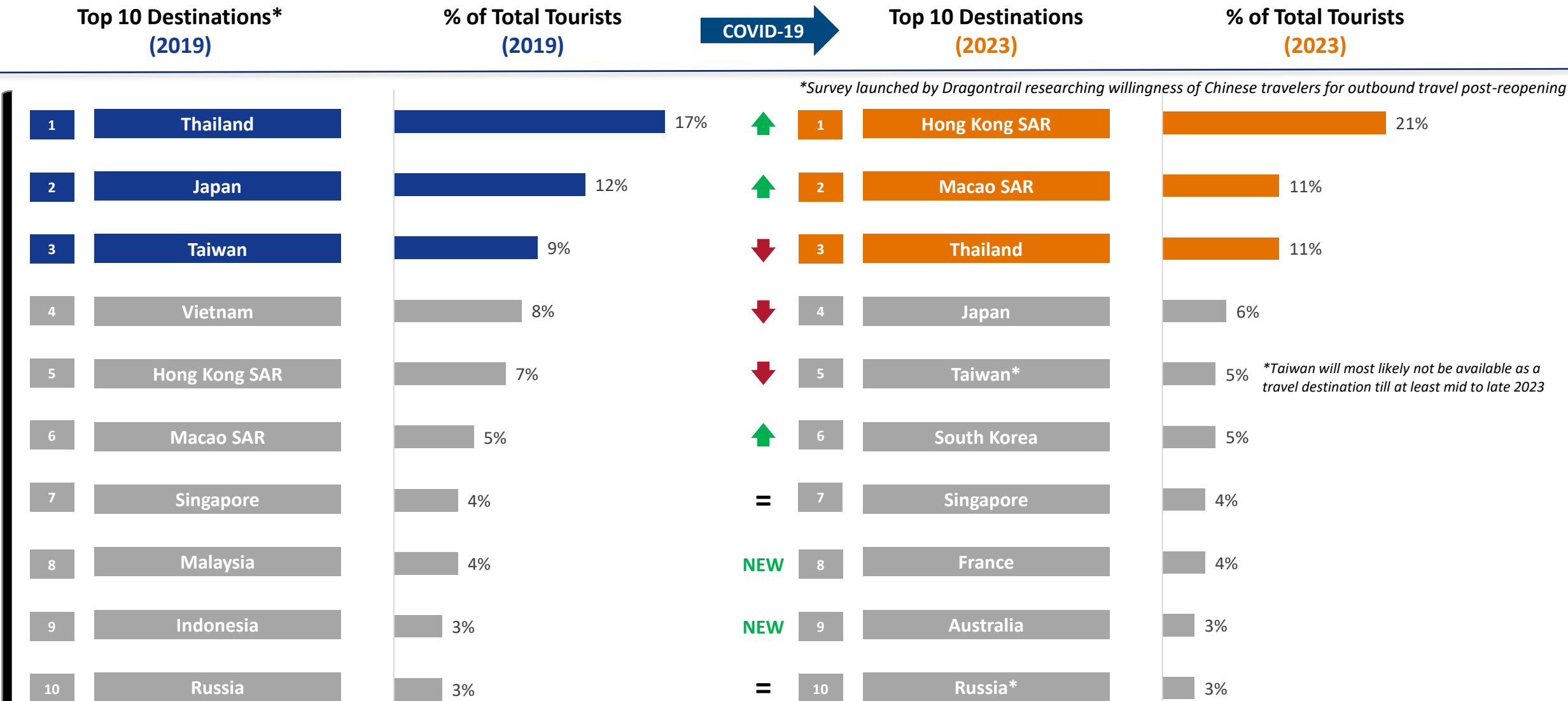
**3. Lasting Impacts of COVID-19**  
 😞  
 COVID-19 has dealt a blow to the Chinese economy and negatively affected the income of many Chinese families. Increased financial burden may dissuade families from traveling or divert them to cheaper destinations in the short term.

**4. War in Ukraine**  
 😞  
 Response on social media shows some tourists in China may be cautious about visiting Ukraine and its bordering countries due to the ongoing war, potentially deterring them from visiting neighboring destinations.



TOP DESTINATIONS BEFORE & AFTER COVID

**While Asian countries remain the top outbound travel choices for Chinese tourists, more people have been opting to travel to more distant destinations (France, Australia) since the pandemic.**



\*Survey launched by Dragontrail researching willingness of Chinese travelers for outbound travel post-reopening

\*Taiwan will most likely not be available as a travel destination till at least mid to late 2023


\*Data is provided by group tour agencies to the ministry

\*Due to travel restrictions in most parts of Europe, Chinese travelers, seeking simplified visa processes, opt for conflict-free regions in Russia.



TOP EUROPEAN-SPECIFIC DESTINATIONS BEFORE COVID

**Niche travel destinations have been on the rise since before the epidemic, with the theme of nature and culture tours being particularly popular among Chinese travelers**

| Top European Regions (2018-2019)   | Top European Destinations (2018-2019)  | Fastest Growing European Destinations (2019 H1)  | Top Themes for European Tours (2019 H1)   |
|--|--|--|---|
| <p>1 Central/Eastern Europe</p>  <p>36%</p> | <p>1 Russia</p> <p>2 Italy</p> <p>3 France</p> <p>4 United Kingdom</p> <p>5 Germany</p> <p>6 Spain</p> <p>7 Greece</p> <p>8 Czech Republic</p> <p>9 Switzerland</p> <p>10 Portugal</p> | <p>1 Croatia ↑ 540%</p> <p>2 Latvia ↑ 523%</p> <p>3 Slovenia ↑ 497%</p> <p>4 Bulgaria ↑ 459%</p> <p>5 Estonia ↑ 321%</p> <p>6 Albania ↑ 300%</p> <p>7 Serbia ↑ 295%</p> <p>8 Malta ↑ 281%</p> <p>9 Ireland ↑ 220%</p> <p>10 Denmark ↑ 212%</p> | <p>1 Travel Photography</p> <p>2 History &amp; Culture</p> <p>3 Hidden Gem Locations 秘境自然</p> <p>4 Fashion &amp; Arts</p> <p>5 Fairy Tale Trip 童话之旅</p> <p>6 Hiking</p> <p>7 Education</p> <p>8 Northern Lights/Aurora</p> <p>9 Cruise</p> <p>10 Hot Springs &amp; Skiing</p> |

Main Source: China Tourism Academy, Ctrip

CHINA'S OUTBOUND TOURISM CONSUMER BEHAVIOR & TRENDS (1/2)

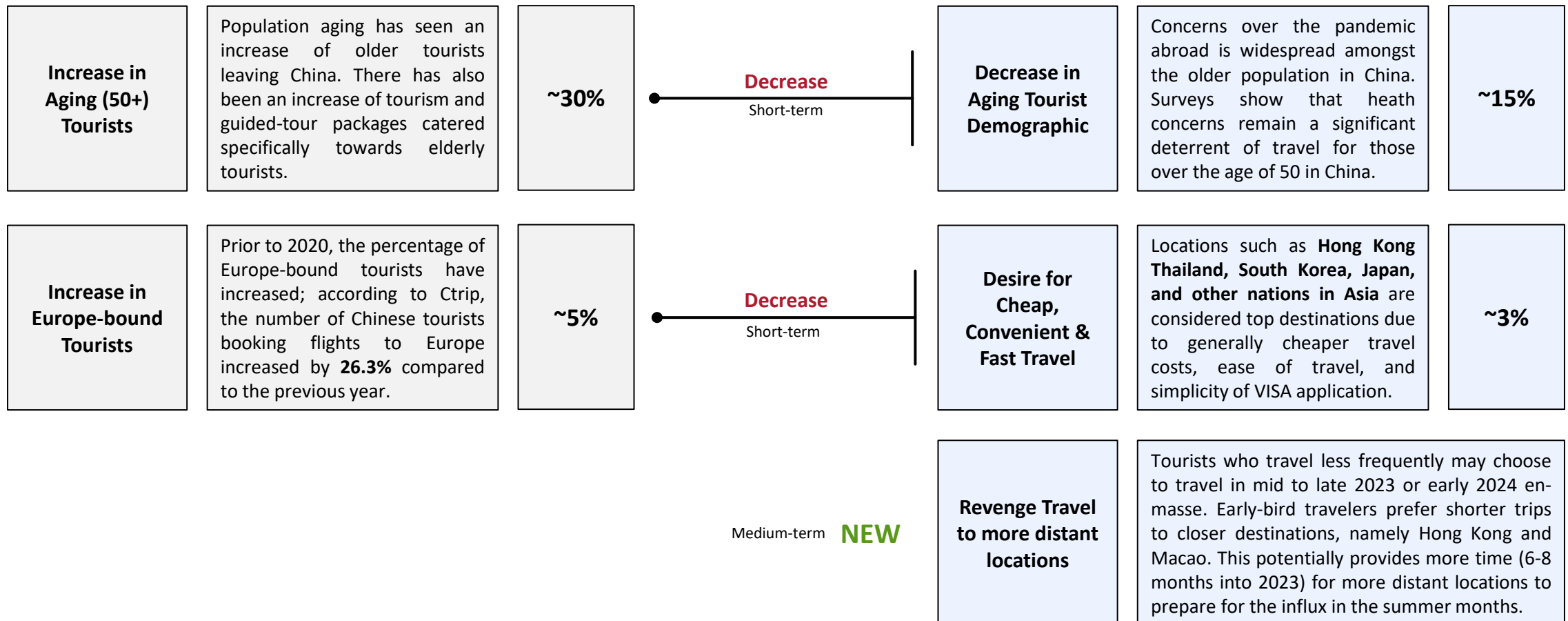
**COVID-19 has directly led to decline in outbound traveling among elder population (usually in the form of group tour). Destination wise, cost-effective neighboring destinations are estimated to gain momentums in short term right after the reopening, yet distant destinations like the Europe will see growth in mid-term via revenge traveling.**

**COVID-19 Impact on Outbound Tourist Demographics & Behavior**

**2019 and Prior**

**% of Tourist Population**

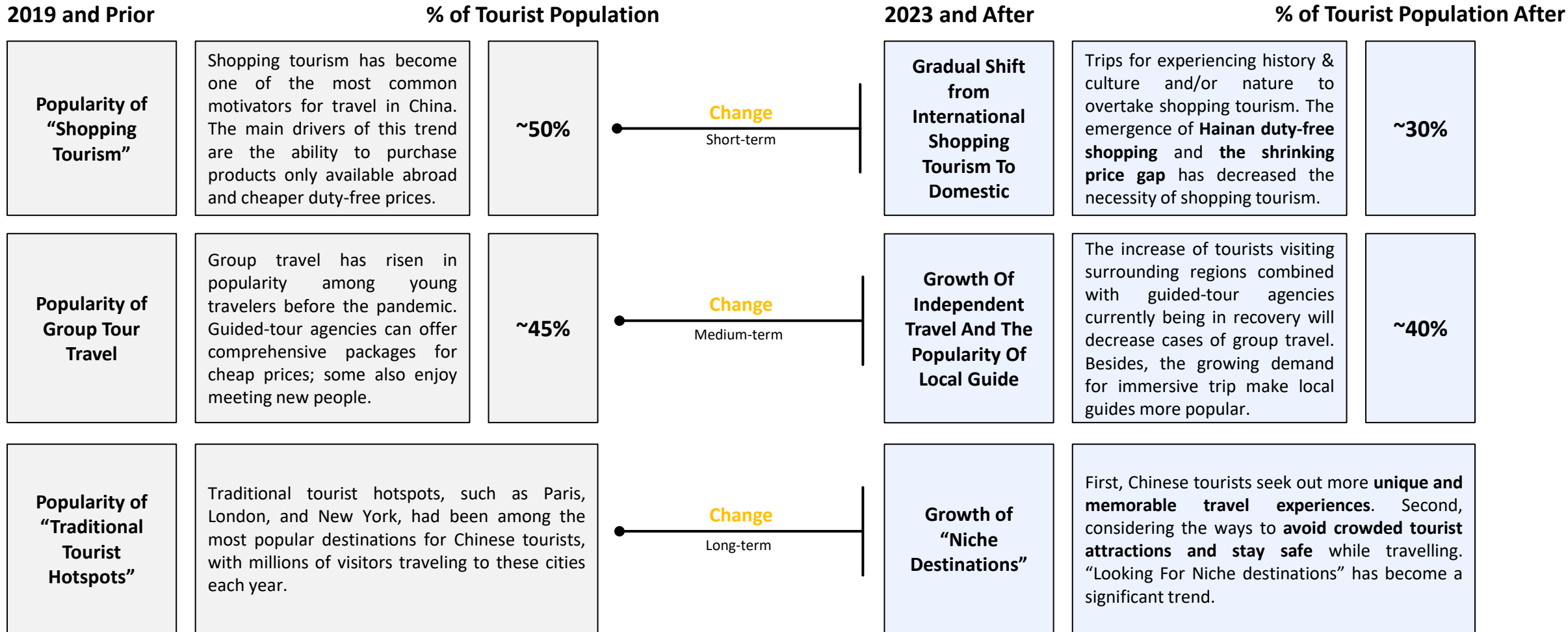
**2023 and After**



CHINA'S OUTBOUND TOURISM CONSUMER BEHAVIOR & TRENDS (2/2)

**It also indirectly catalyzes changes in traveling objectives (less outbound shopping tourism), travel type (less group tour) and preferred destination (more explorative towards niche destinations).**

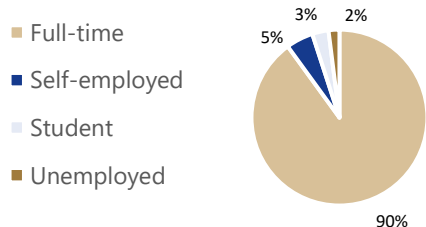
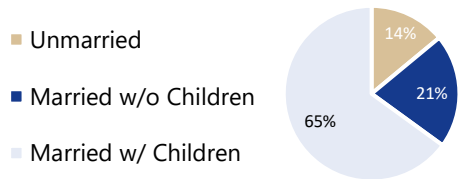
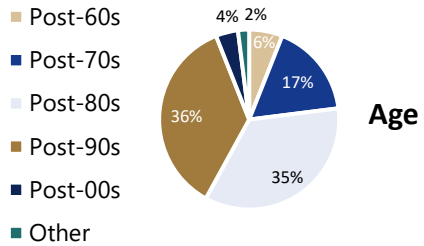
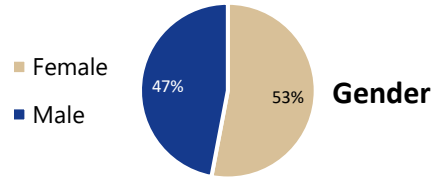
**COVID-19 Impact on Outbound Tourist Demographics & Behavior**



OUTBOUND TRAVELER DEMOGRAPHICS BEFORE COVID

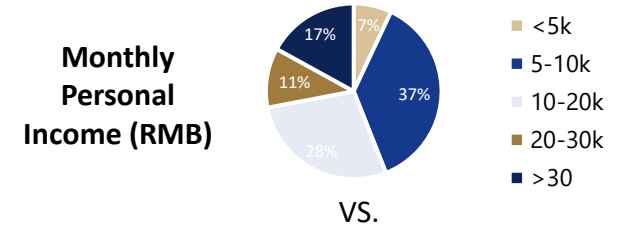
**They are young and middle-aged travelers with relatively high income and often traveled with their families.**

**Chinese Outbound Traveler Demographical Distribution Before COVID (2018-2019)**

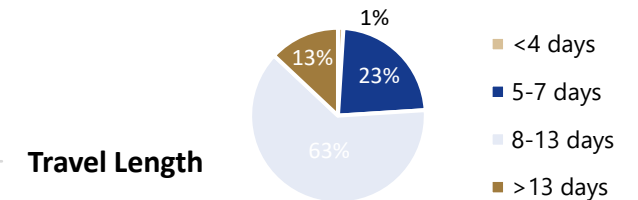
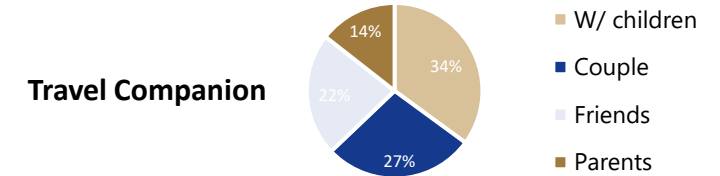


**City of Residence**

1. Shanghai
2. Beijing
3. Guangzhou
4. Chengdu
5. Chongqing



*\*~95% of the Chinese population has a per capita monthly personal income of less than 5k RMB*



*\*Prior to the pandemic, ~45% of Chinese travelers chose group travel when touring abroad.*

# 03

## BEHAVIORS OF CEE (*CENTRAL-EASTERN EUROPE*) TRAVELERS

### 1) Traveler Profile (demographic x companion)

- *Gender Q1.1*
- *Age Q1.2*
- *Marital Status Q1.3*
- *City Q1.4*
- *Annual Household Income Q1.5*
- *Employment Status Q1.6*
- *Travel Partner Q1.11*

### 2) Traveling Psychographic & Behavior (objective & expectations, traveling patterns)

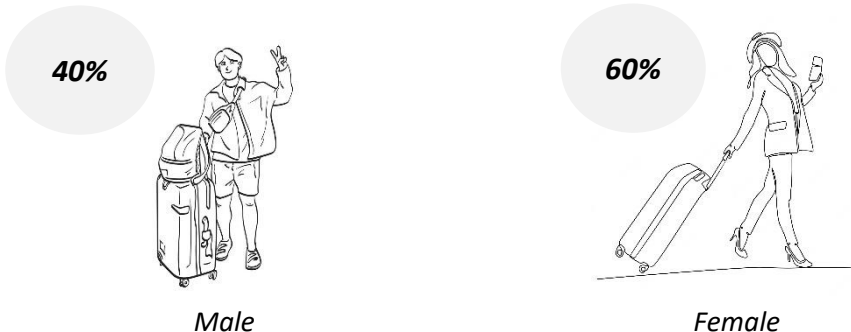
- *Travel Purpose Q1.8*
- *Travel Frequency in general Q1.9*
- *Outbound Travel Frequency Q1.10*
- *Travel Mode Q1.12*
- *CEE travel experience in 2017-2019 Q2.1*
- *CEE travel length Q2.2*
- *CEE travel spending Q2.3*

TRAVELER PROFILE (1/2)

**Travelers of Central and Eastern Europe fall dominantly into the age group of 20-44, with the majority of them being full-time employed & family-oriented travelers.**

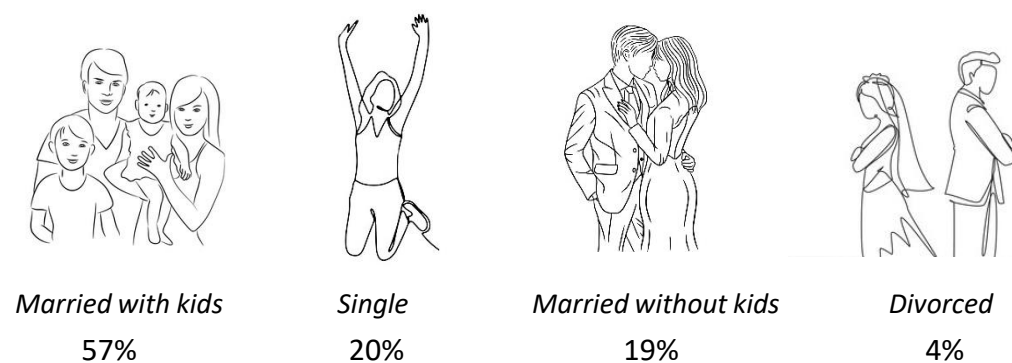
**Gender Distribution**

N = 600, single choice



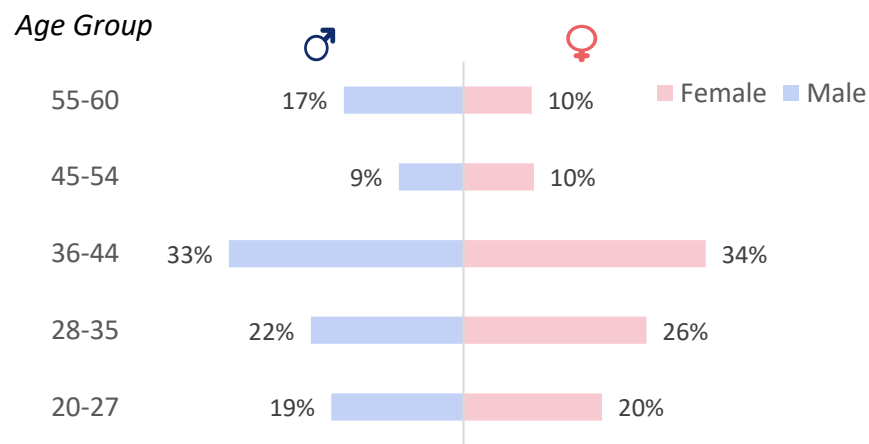
**Marital Status Distribution**

N = 600, single choice



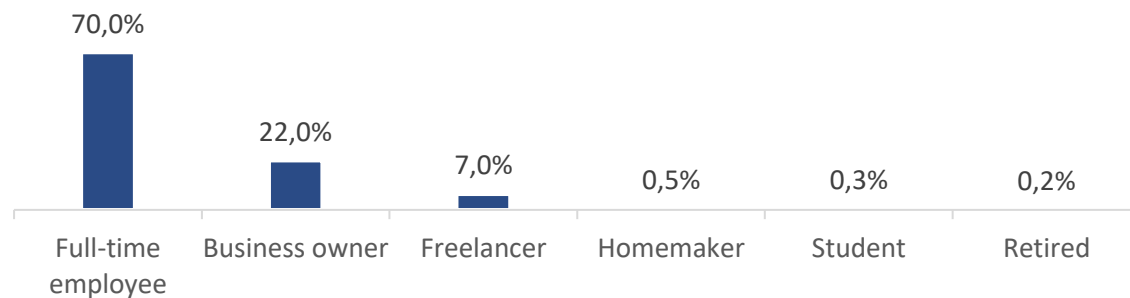
**Age Distribution by Gender**

N = 600, single choice



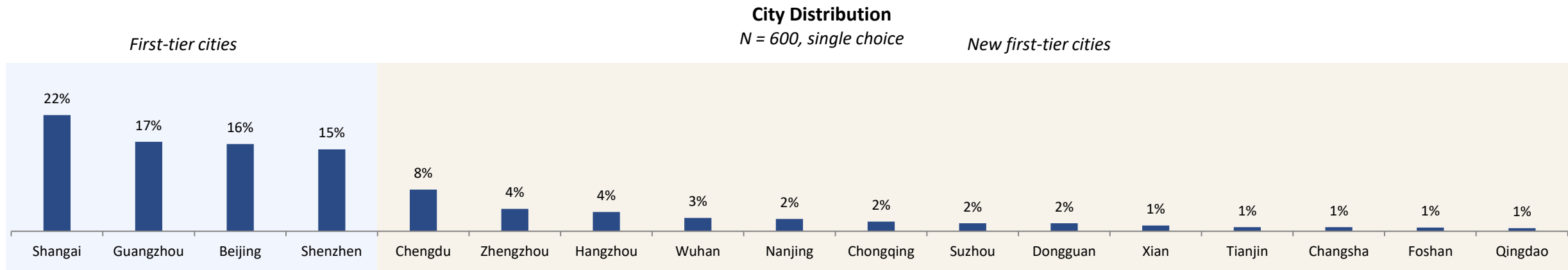
**Employment Status Distribution**

N = 600, single choice



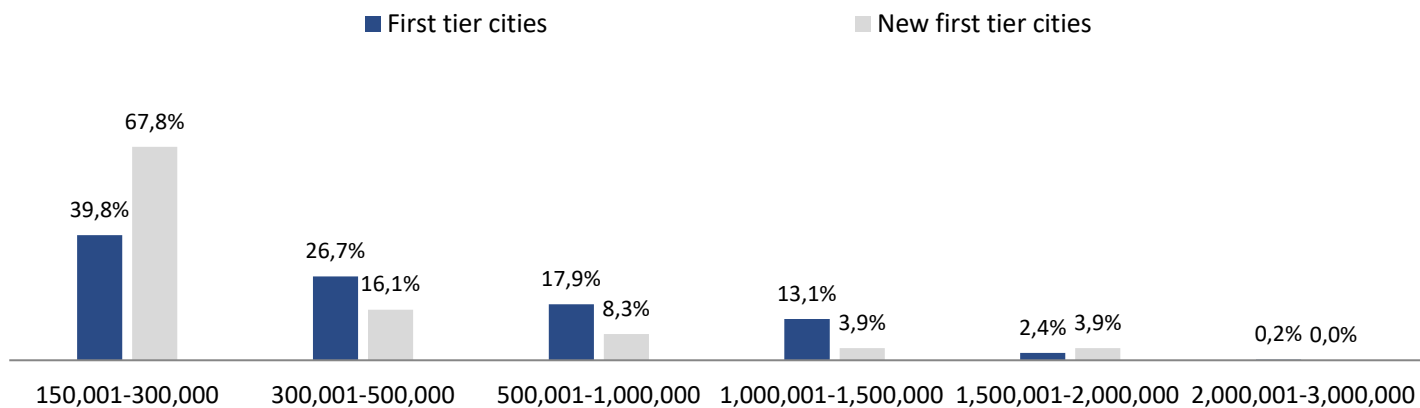
TRAVELER PROFILE (2/2)

Although the income level in New-Tier-1 cities is generally lower than in Tier-1 cities, high-rollers' potential cannot be overlooked.



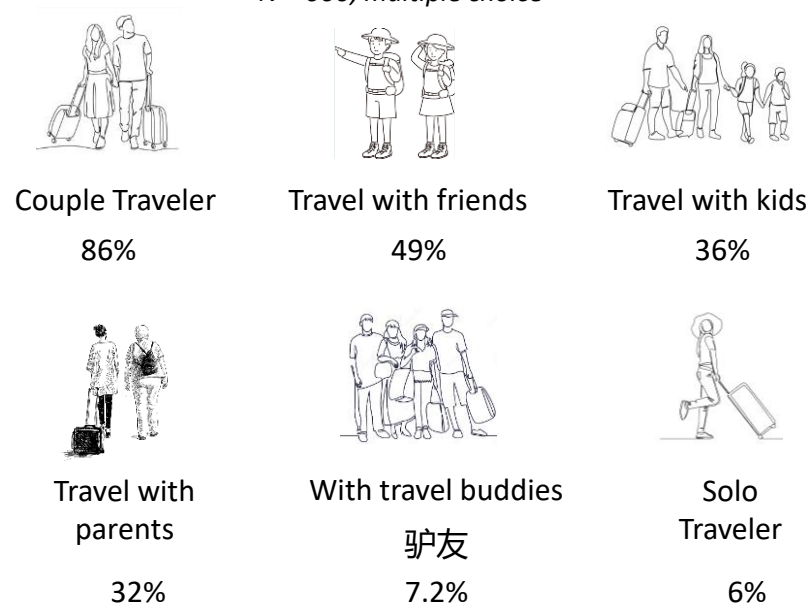
### Income Distribution by city tier

N = 600, single choice



### Travel Partner Distribution

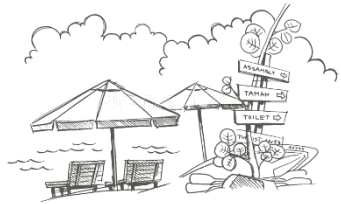
N = 600, multiple choice



TRAVELING PSYCHOGRAPHIC & BEHAVIOR - TRAVEL BEHAVIOR

**Leaving the pandemic out, the majority of their outbound travels occur biannually (incl. travel to Asian countries), featured with vacation and sightseeing. Group tours are generally adopted.**

**Travel Purpose (CEE)**  
n=600, multiple choice up to 3



Relaxing 休闲度假\*

73%



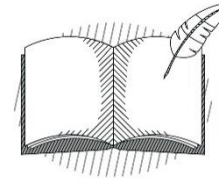
Sightseeing 观光\*

64%



Activities 文娱活动\*

39%



To learn or experience new things (to be educated)  
拓宽视野

39%



Shopping 购物

37%



Visiting friends and family  
探亲访友

9%

**\*Relaxing:** It refers to a type of vacation or holiday that focuses on **relaxation and enjoyment, not necessarily refers to a type of beach vacationing.** It involves engaging in various activities to **unwind and rejuvenate**, for example, food and cuisine, spa, and wellness. This kind of leisure vacation **involves simply taking time to relax and enjoy the amenities offered by resorts, hotels, or leisure centers.**

**\*Sightseeing:** In China, “sightseeing 观光” usually involves **visiting popular or significant landmarks, historical sites, natural wonders, cultural heritage sites,** or other points of interest. The purpose is to **admire and appreciate the beauty, cultural significance, or historical value of the places being visited.**

**\*Activities:** Activities during travel include **outdoor activities** (hiking, camping, skiing, surfing, etc.), **cultural experiences** (immersing oneself in the local culture by attending traditional performances, visiting museums, galleries, etc.), **adventure activities** (paragliding, rock climbing, etc.), **wildlife and nature exploration** (wildlife safaris, nature walks, etc.)



TRAVELING PSYCHOGRAPHIC & BEHAVIOR - TRAVEL BEHAVIOR

**Leaving the pandemic out, the majority of their outbound travels occur biannually (incl. travel to Asian countries), featured with vacation and sightseeing. Group tours are generally adopted.**

**Outbound Travel Types**

N = 600, multiple choice



Group Travel\*  
跟团游  
80%



Independent Travel  
自由行  
25%



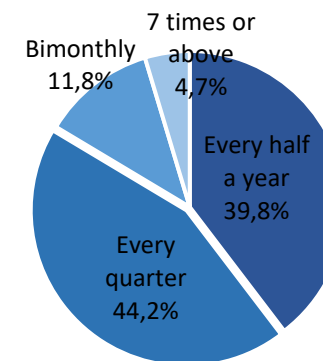
With Local Tour Guide  
找当地向导  
22%

\*Group travel in China usually takes 2 forms, including:

- Organized tours: many travel agencies in China offer organized group tours to popular destinations. These tours typically have a **fixed itinerary, transportation, accommodations, and a tour guide who leads the group throughout the trip.**
- Customized group: Some people prefer to **customize their travel experience by working with travel agencies to create a tailored itinerary that suits their own interests and preferences.** This can include selecting specific destinations and activities. That being said, **high-net-worth / explorative outbound travelers could also be included in the format of group traveling.**

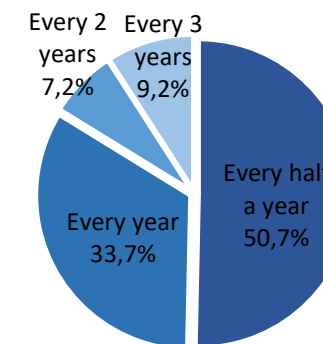
**Travel Frequency a year in general**

N = 600, single choice



**Outbound Travel Frequency**

N = 600, single choice

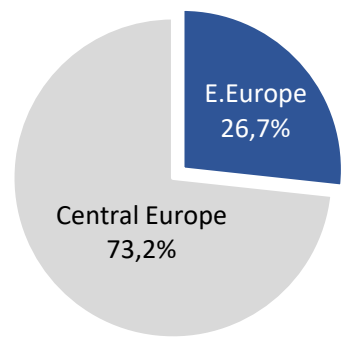


TRAVELING PSYCHOGRAPHIC & BEHAVIOR – CEE TRAVEL EXPERIENCE BEFORE PANDEMIC

**And among all CEE countries, Germany ranks first (30%) in popularity followed by Poland (18%) and Belarus (17%).**

Distribution of travel in CEE (pre-pandemic)

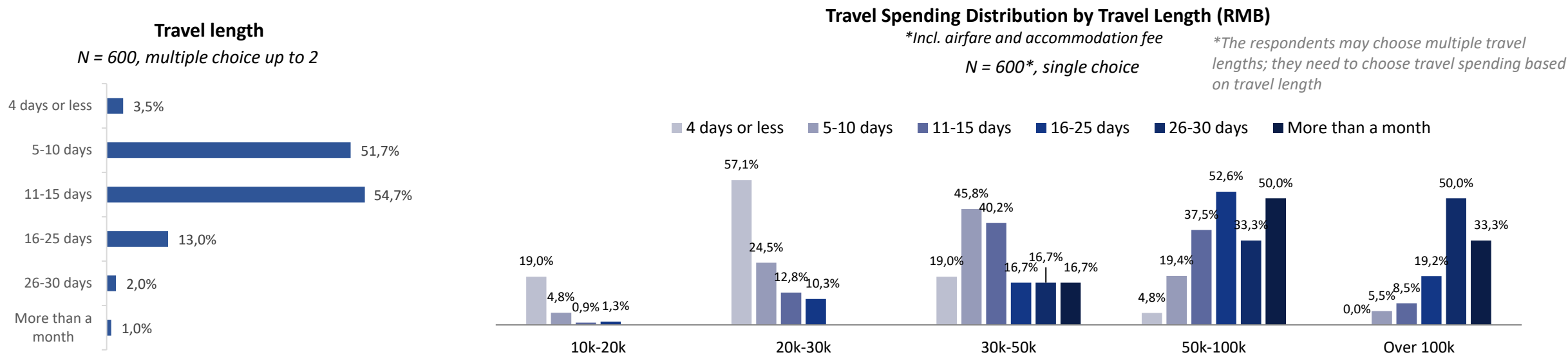
N = 600, multiple choice



Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)  
 Analysis based on: Q2, Q5

TRAVELING PSYCHOGRAPHIC & BEHAVIOR – CEE TRAVEL EXPERIENCE

**The typical length of a trip to Central and Eastern Europe ranges from 5 to 15 days, at costs ranging between 3,000 to 7,000 Euros.**



Travelers to Central and Eastern Europe typically stay for **5-15 days**, which includes long public holidays plus one weekend for visitors from mainland China. Those staying **longer than 15 days** are usually **seeking local cultural or immersive experiences**. For those staying within the 5-15 day range, a common travel expenditure is between 20,000-50,000 CNY (approximately 3,000-7,000 EUR). However, for those staying up to 25 days, expenses can exceed 100,000 CNY (approximately 14,000 EUR). Travelers staying beyond a month, on the other hand, tend to have reduced costs due to prioritizing cost-effectiveness and minimizing expenses at tourist attractions.

# 04

## PERCEPTIONS ON POLAND AMONG CEE TRAVELERS

### 1) Knowledge & Perception towards Poland

- *Perceptions of Poland [For those who have travel experience in Poland] Q2.4*
- *Perceptions of Poland [For those who haven't been to Poland] Q2.5*
- *Unpleasant experience in Poland [For those who have been to Poland but had unpleasant experience] Q2.6*
- *Negative impressions to Poland [For those who haven't been to Poland but has negative impressions] Q2.7*
- *Info that would help in selecting Poland as a travel destination [For those who haven't been to Poland] Q2.8*

### 2) Main Attraction Themes

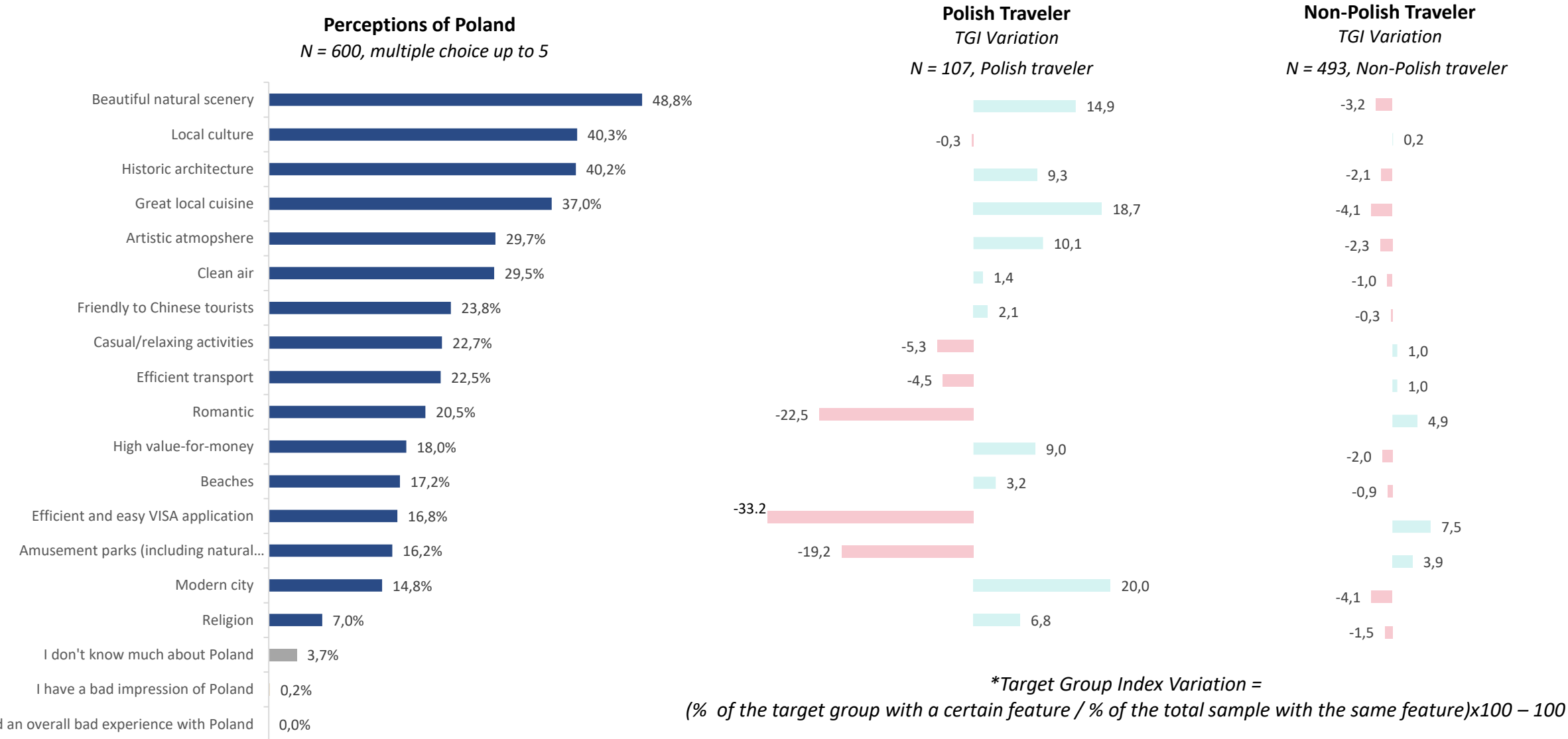
- *Recommended attraction portfolio in Poland Q3.1*

### 3) Perceived Alternative & Complementary Destinations for Poland

- *Comparable travel destination to Poland Q3.2*
- *Reasons for choosing certain destinations as Poland's competitors Q3.3*
- *Collegial destinations with Poland Q3.4*
- *Reasons for choosing certain destinations as portfolio tour Q3.5*

KNOWLEDGE & PERCEPTION TOWARDS POLAND (1/2)

**Poland is well recognized for its natural scenery (49%), local culture (40%), and historical architecture (40%). In particular, real Polish travelers show stronger appreciation to the local cuisine & concerns on visa applications.**



Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)  
 Analysis based on: Q2-4, Q2-5, Q2.1+Q2.4, Q2.1+Q2.5

KNOWLEDGE & PERCEPTION TOWARDS POLAND (2/2)

**Non-Poland visitors show generally weaker knowledge of the country and value first-hand reviews from previous Poland visitors in making up traveling decisions to Poland.**

**Top Perceptions of Poland**

Source: Social Listening + Survey Results (Q2.4, Q2.5)



Historical architecture



Beautiful natural scenery



Artistic atmosphere



Local culture



Local Cuisine

**Perceptions of tourists who never visited Poland**

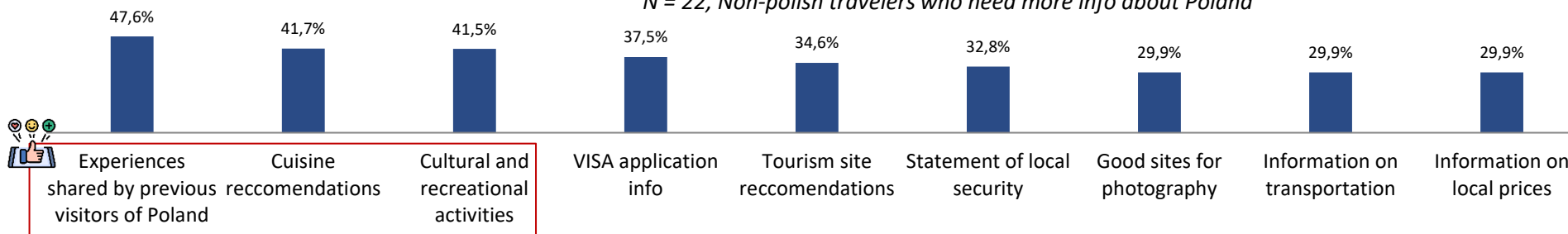
- TGI are generally lower across all perceptions, suggesting **weaker understanding of Poland even among the European travelers.**
- Slight negatives in terms of attractions (e.g., scenery, cuisine, etc.), suggest there is **no singular aspect of Poland that stands out** to the general tourist.
- A slightly higher TGI value for “Romantic” and “Easy VISA application” suggest **perceptions of Europe as a whole are being projected onto Poland**, further implying somewhat of a lack of value propositions for Poland.

**Perceptions of tourists who have visited Poland**

- The **biggest shifts in perception are those of attractions.** There is now a strong trend in terms of selection of **natural scenery, cuisine, architecture, and city-feel.**
- “**Romantic**”, “**Amusement Parks**”, “**Easy VISA application**”, show the **biggest decrease** in terms of selection. This is not necessarily a negative result, as the first two do not need to be Poland’s value propositions. There are less selections for “Easy VISA application” as there is now comparison with other European countries.
- Overall, tourists perceive Poland as a scenic, historic destination with a fresh, artistic atmosphere.

**Further information to help make travel decisions to Poland**

N = 22, Non-polish travelers who need more info about Poland

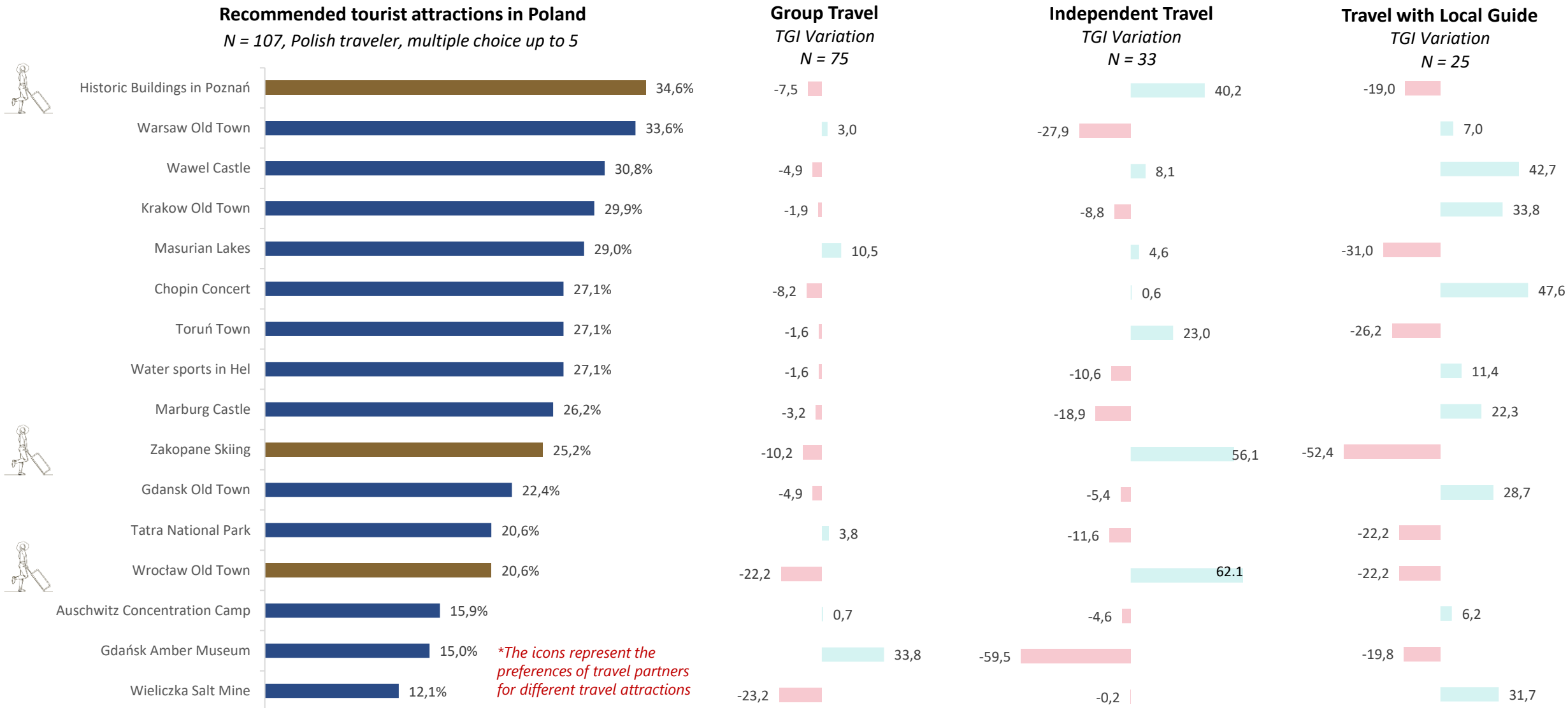


**\*Negative Perceptions**

Out of all the respondents, only one had a negative perception of Poland. The individual in question says he felt discriminated against as a Chinese. This is attributed mostly to personal experience and is not a persistent issue.

MAIN ATTRACTION THEMES (1/3)

**Historical landmarks like buildings in Poznań, Warsaw Old Town & Castle and Karkow Old Town are strongly recommended (>30%) by real visitors. In particular, independent travelers show significantly stronger appreciations on Zakopane Skiing and Wroclaw Old Town.**













Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)

Analysis based on: Q3.1

MAIN ATTRACTION THEMES (2/3)

**Among all attractions, *Warsaw Old Town* and *Krakow Old Town* enjoy both established visibility (>20%) on Chinese social media and high recommendation rates (>30%) from previous visitors. While *Auschwitz Concentration Camp* and *Wieliczka Salt Mine* show high visibility (>25%) yet low recommendation rates (<15%).**

**Top 10 Destinations for Chinese Tourists Visiting Poland (RED)**

| Recommended Possibilities<br>(Survey, Q3.1)   | Top-mentioned attractions on Red               | Mentioned by Confirmed Polish Travelers (N=100) | Total posts from June 2022 to May 2023 (N=1,830)<br><i>Awareness</i> |
|---|--|---|--|
| 16%    | <b>1</b> <b>Auschwitz Concentration Camp</b>   | <b>1st</b><br>(29 persons)                      | ~30%   |
| 34%    | <b>2</b> <b>Warsaw Old Town</b>                | <b>2nd</b><br>(25 persons)                      | ~50%   |
| 12%    | <b>3</b> <b>Wieliczka Salt Mine</b>            | <b>3rd</b><br>(24 persons)                      | ~35%   |
| 30%    | <b>4</b> <b>Krakow Old Town</b>                | <b>4th</b><br>(21 persons)                      | ~40%   |
| 35%    | <b>5</b> <b>Historical Buildings in Poznań</b> | <b>=5th</b><br>(18 persons)                     | ~15%   |
| 27%    | <b>5</b> <b>Chopin Concert</b>                 | <b>=5th</b><br>(18 persons)                     | ~5%  |
| 31%   | <b>7</b> <b>Wawel Castle</b>                   | <b>7th</b><br>(16 persons)                      | <5%  |
| 29%  | <b>8</b> <b>Masurian Lakes</b>                 | <b>8th</b><br>(7 persons)                       | <5%  |
| 21%  | <b>9</b> <b>Wrocław Old Town</b>               | <b>9th</b><br>(6 persons)                       | ~5%  |
| 27%  | <b>10</b> <b>Toruń Town</b>                    | <b>10th</b><br>(5 persons)                      | <5%  |

\*Shaded area sources from survey results, while other sources extract from social media RED for assessing attraction popularity and recommendation possibilities



MAIN ATTRACTION THEMES (3/3)

**Hidden gems play a significant role in social media marketing by fostering a niche and highly regarded image of Poland, meanwhile organically generating traffic from Polish travelers and capturing attention on Chinese social media.**

**Perceptions of Main Tourist Attractions in Poland**

(Social listening on RED)



*"The **Wieliczka Salt Mine** is a must-see for first-time travelers in Poland. It is ideal for **taking pictures** and is **hauntingly beautiful**."*

*"The **Masurian Lakes** are a hidden gem. I think it's perfect for those looking for a **relaxing sightseeing tour across Eastern Europe**."*

*"The **Auschwitz Concentration Camp** is an important destination for me, as I hail from a country that was also involved WWII and I wish to see this **shared past**."*

*"**Warsaw Old Town** has a cluster of different attractions, it conveniently gives tourists a glimpse into **Poland's rich culture and past**."*

**1. Hero Locations**

**2. Locations in Need of Enrichment**

**3. Hidden Gem Locations**

- Recommendation rate
- Number of visitors
- Awareness on social media

>25%    >15 persons    >20%

<25%    >15 persons    >20%

>25%    <15 persons    <20%

These sites have contribute greatly to the formation of potential tourists' initial perception of Poland, and serve as destinations which anchor Poland into cross-Europe tour packages and plans.

Such sites have received above-average levels of tourists, but relatively lower rates of recommendation, signaling a need for the filling of gaps in terms of tourist experience.

Such sites have the potential to become key attractions and should be the focus of marketing efforts, either internally or via KOLs to gradually accumulate presence and awareness.

**Warsaw Old Town**

**Auschwitz Concentration Camp**

**Masurian Lakes**

**Krakow Old Town**

**Wieliczka Salt Mine**

**Wawel Castle**

**Toruń Town**

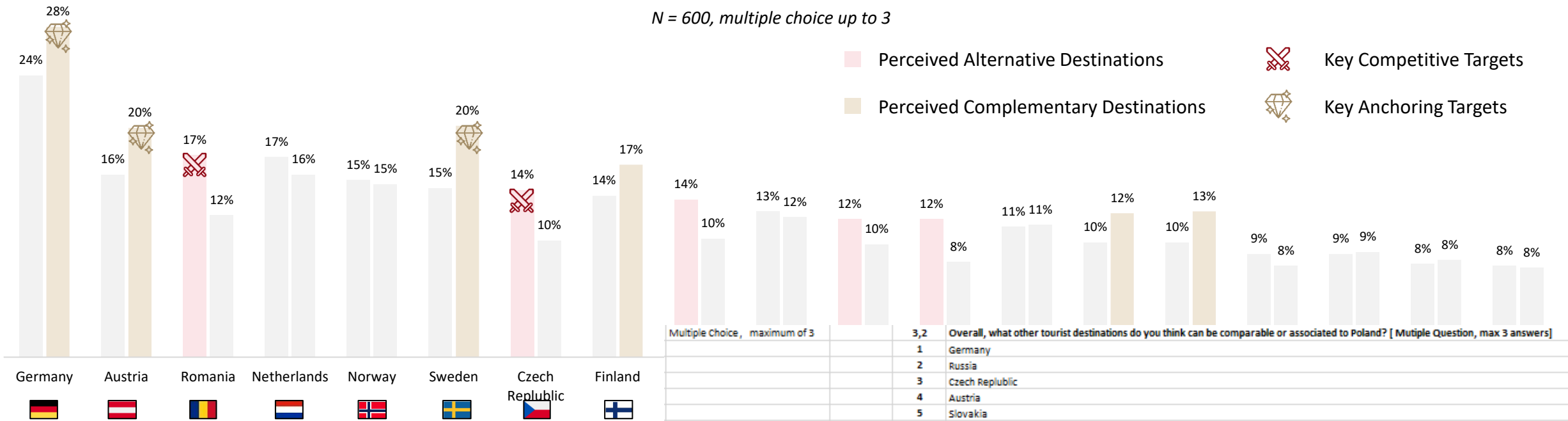
Source: Chinese Social Media RED 小红书

PERCEIVED ALTERNATIVE & COMPLEMENTARY DESTINATIONS FOR POLAND (1/2)

**Germany, Austria and Sweden** are perceived to be more complementary destinations towards Poland, while **Romania and Czech Republic** are perceived more as competitive destinations. In particular, compared with general CEE travelers, real Polish travelers show significantly stronger tendency to anchor rather than replace Poland with Germany.

Alternative & Complementary destinations

N = 600, multiple choice up to 3



Top 3 alternative & complementary destinations chosen by Polish travelers



| Multiple Choice, maximum of 3 | Overall, what other tourist destinations do you think can be comparable or associated to Poland? [ Multiple Question, max 3 answers] |
|-------------------------------|--|
| 14%                           | 1  |
| 10%                           | 2  |
| 13%                           | 3  |
| 12%                           | 4  |
| 12%                           | 5  |
| 10%                           | 6  |
| 12%                           | 7  |
| 8%                            | 8  |
| 11%                           | 9  |
| 11%                           | 10   |
| 10%                           | 11   |
| 12%                           | 12   |
| 10%                           | 13   |
| 13%                           | 14   |
| 9%                            | 15   |
| 8%                            | 16   |
| 9%                            | 17   |
| 9%                            | 18   |
| 8%                            | 19   |
| 8%                            | 20   |
| 8%                            | Others, please specify   |

Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)

Analysis based on: Q3.2, Q3.4, Q3.2+ Q2.1, Q3.4+Q2.1

PERCEIVED ALTERNATIVE & COMPLEMENTARY DESTINATIONS FOR POLAND (2/2)

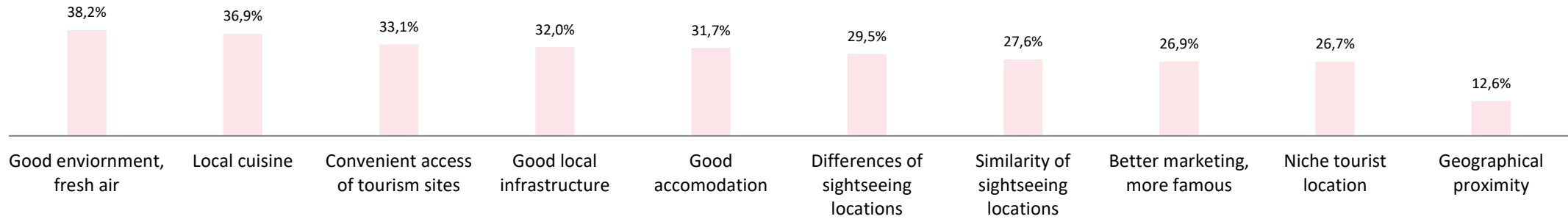
**CEE travelers tend to include Poland in 2 different types of destination bundling:**

- 1) **'Germany Plus'** where Germany & Austria are perceived to be strongly complementary due to geo proximity; and
- 2) **'NE+CEE'** where Sweden & Finland stand out to complement Poland with differentiated Northern European experiences

**Homogeneous factors for choosing these destinations as alternatives against Poland**

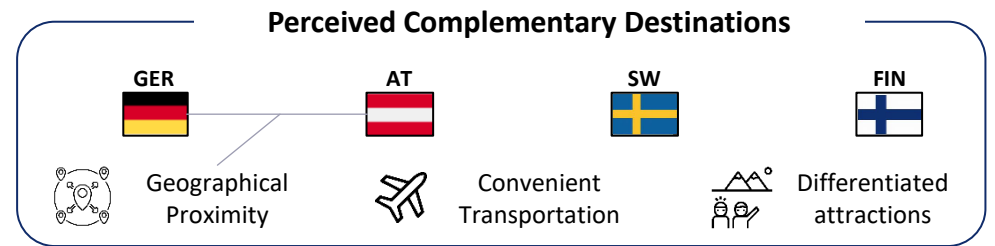
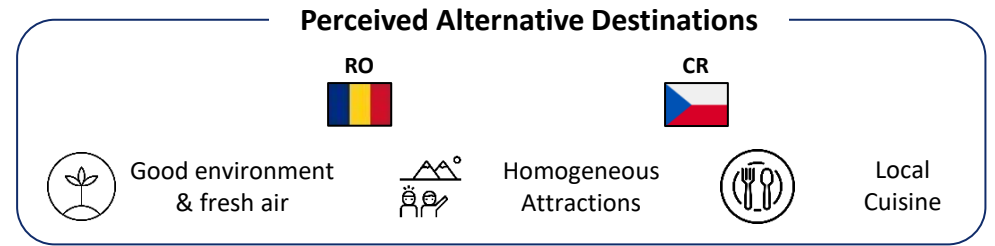
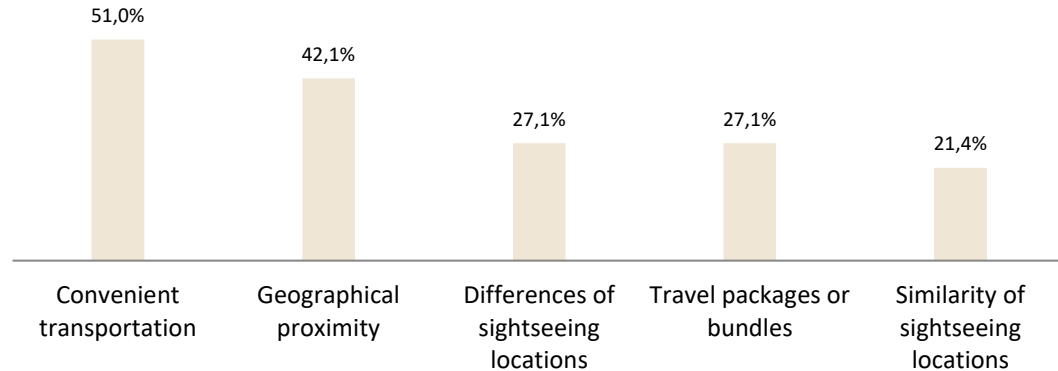
N = 600\*, multiple choice

*\*the respondents may choose multiple countries as alternative countries; they need to choose reasons for each country*



**Differentiating factors for choosing these destinations as complementary toward Poland**

N = 600\*, multiple choice



# 05

## DECISION-MAKING PROCESS & POTENTIAL TOUCHPOINT OF CEE TRAVELERS

### 1) Inspirations & Trigger Points on Outbound Destinations

- *Inspirational Channels for choosing travel destinations Q4.1*
- *Social media platforms used to get inspirations Q4.2*

### 2) Research & Decision-making Process (Channels, Selection Criteria)

- *Searching channels for travel information Q4.3*
- *Types of outbound travel content Q4.4*
- *Local activities that they are interested in Q4.5*
- *Decision-making factors Q4.6*

### 3) Post-trip Sharing

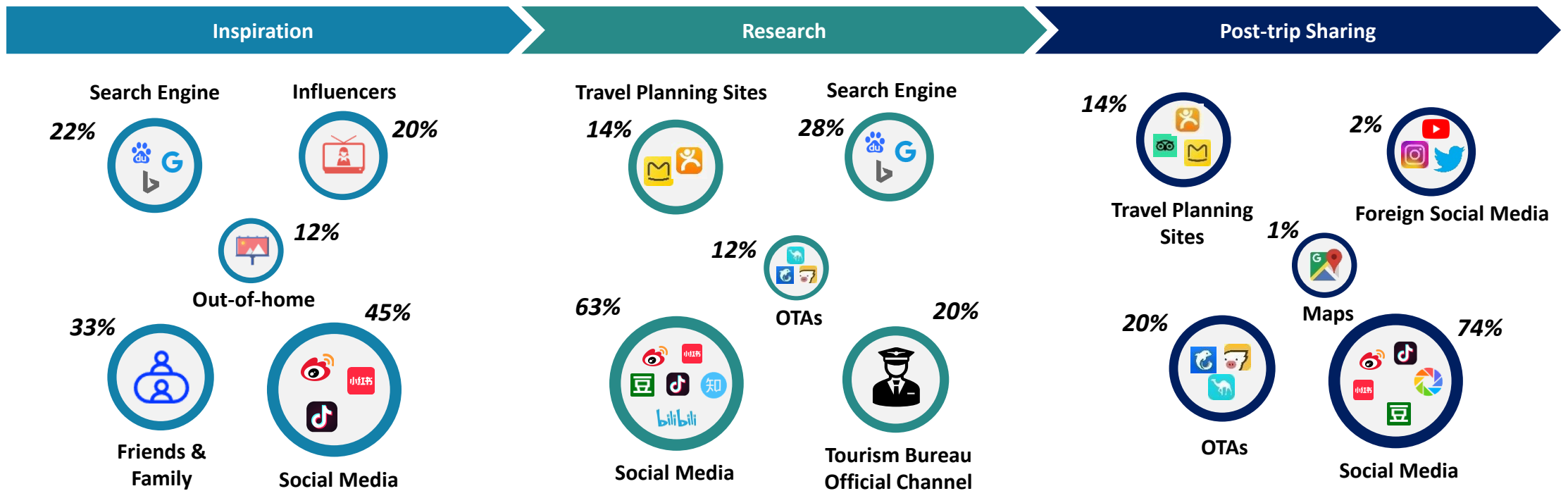
- *Sharing habit Q4.7*
- *Sharing channels Q4.7*
- *Sharing content Q4.9*
- *Main reason for sharing Q4.10*

INSPIRATIONS & TRIGGER POINTS ON OUTBOUND DESTINATIONS - KEY CHANNELS ON THE TRAVELERS' DECISIONS

**Social media plays the largest role in the entire consumer journey, especially during the pivotal research phase where a decision on the destination is made; users value the honest & real experiences shared by others to help in their decision making**

**Consumer Journey of Chinese Tourists by Channel**

*N = 600, multiple choice up to 5*



- Inspiration for travel comes from no singular source and does not indicate the final choice of destination.
- Word-of-mouth of friends plays an important role in seeding potential destinations, as their experiences are more trusted and comprehensive.

- Most research for destinations are done on Douyin and XHS. Douyin provides strong visual storytelling, while XHS is extremely descriptive and provides comprehensive guides.
- Travel planning sites are used to pick specific sites to visit based on ratings.

- The rating system of some OTAs and travel planning sites causes reviews to often become quite binary, only talking about the good and bad.
- On social media, reviews detail more comprehensive experiences (opposed to just a critique of the good and bad).

INSPIRATIONS & TRIGGER POINTS ON OUTBOUND DESTINATIONS (1/2) – INSPIRATIONAL CHANNELS FOR TRAVEL SELECTION

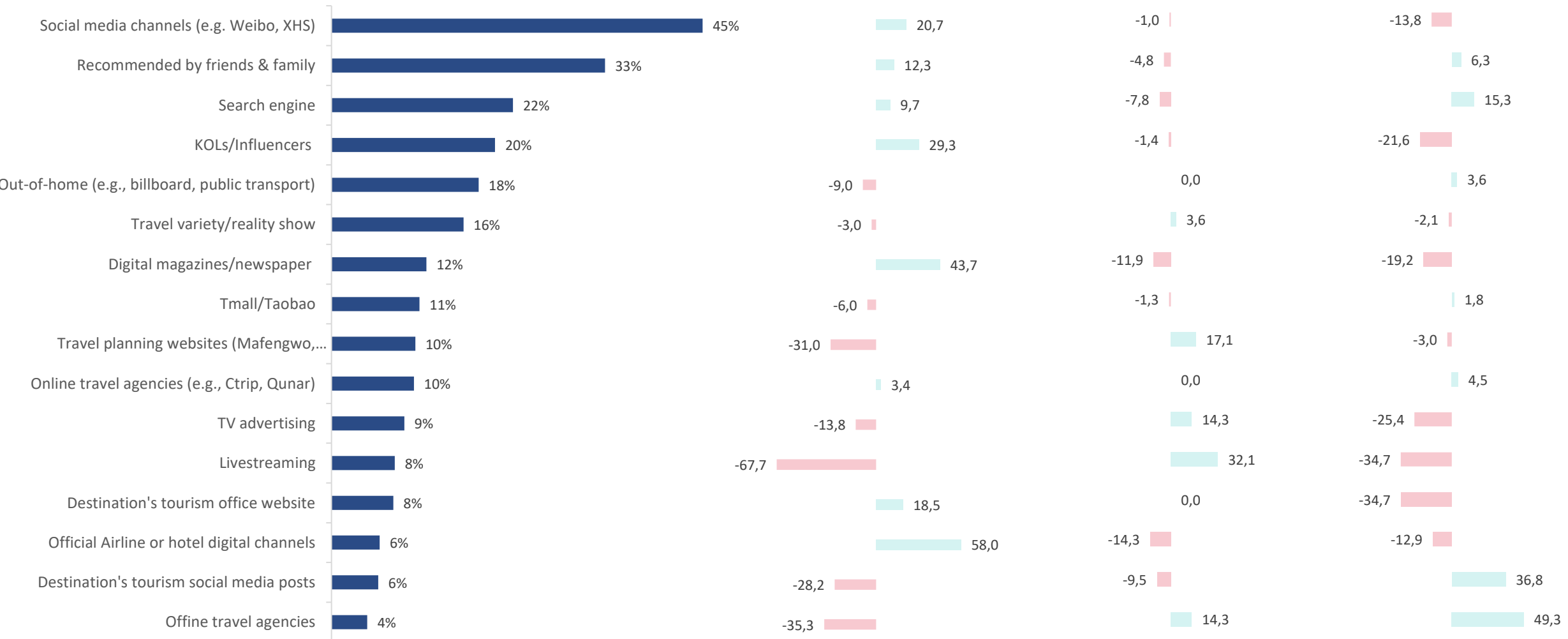
**Social media, search engines, and word-of-mouth are the biggest sources of travel inspiration; offline channels are becoming less influential, possibly due to them being perceived as advertisements**

**Inspirational channels for travel selection**  
N = 600, multiple choice up to 5

**20-27 Y.O.**  
TGI Variation  
N = 116

**28-44 Y.O.**  
TGI Variation  
N = 350

**45-60 Y.O.**  
TGI Variation  
N = 134

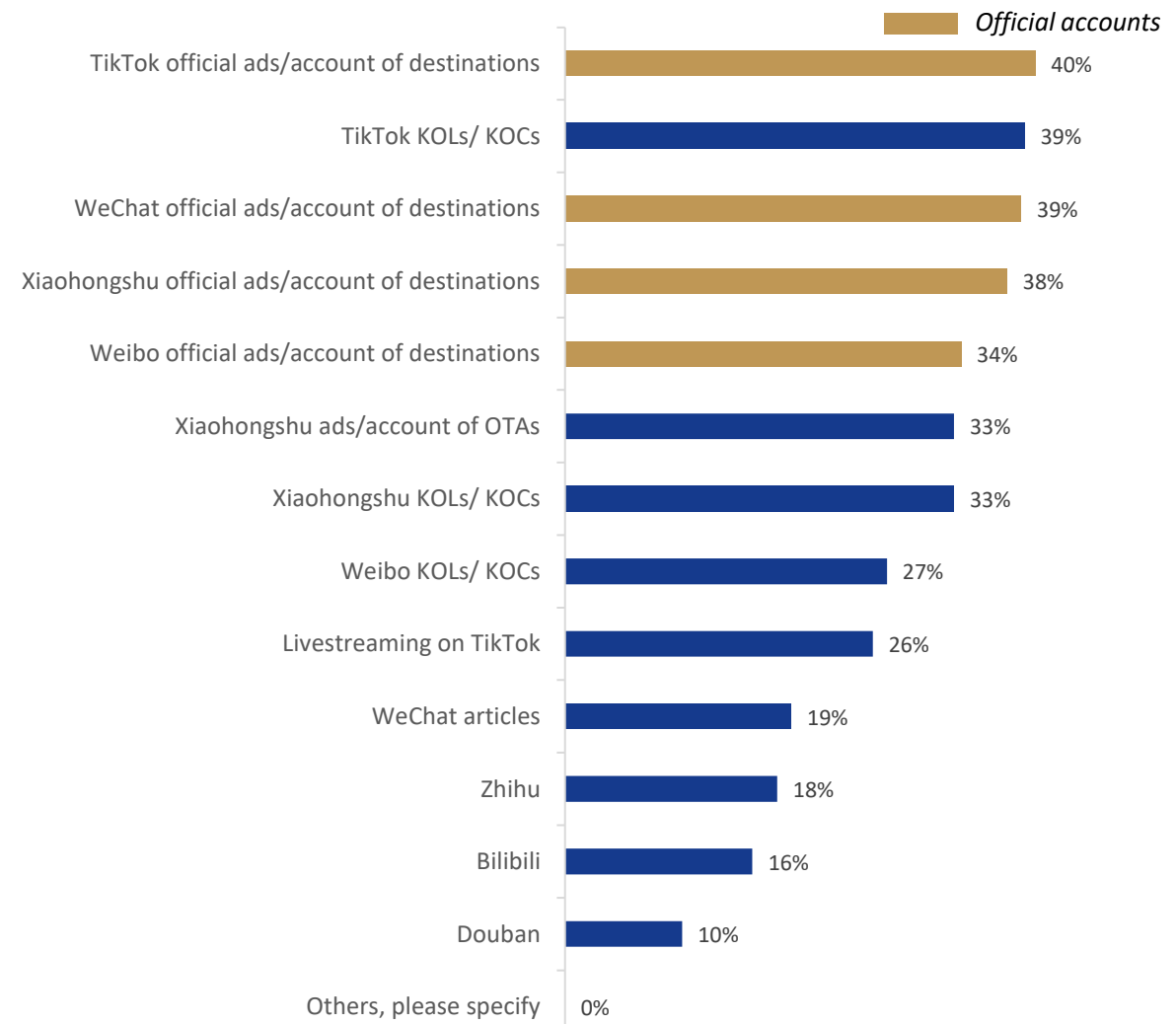


Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)  
Analysis based on: Q4.1, Q4.1+Q1.2

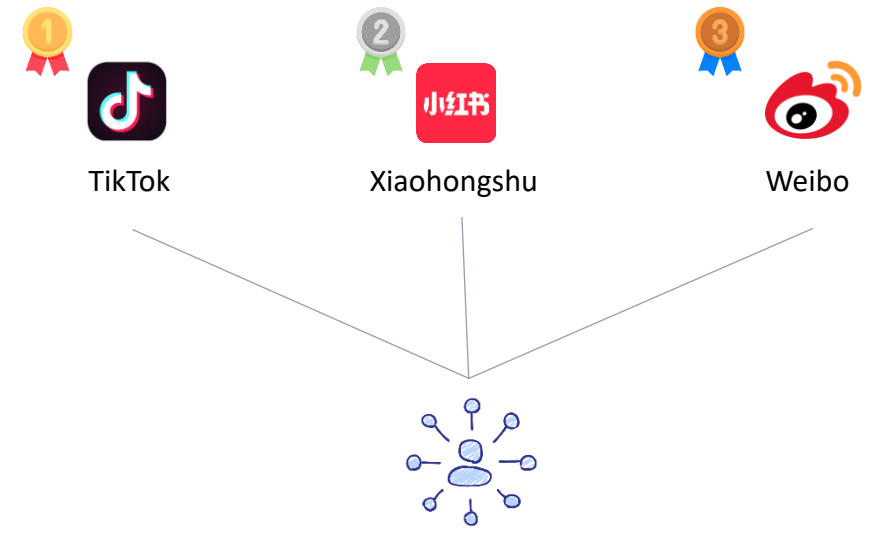
INSPIRATIONS & TRIGGER POINTS ON OUTBOUND DESTINATIONS (2/2) – DEEP DIVE ON SOCIAL MEDIA

**Travelers still rely heavily on official channels for inspiration, as the information available is comprehensive in terms of attractions; KOLs as their honest opinions and documentation are valued**

**Social media platforms used for getting travel inspirations**  
N = 331, multiple choice, social media users for travel inspirations



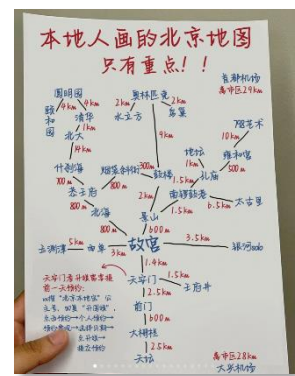
**Top-Mentioned Social Media Apps/Platforms**



**Travel-relevant content is the key touchpoint in inspiring travelers**



Travel diaries



Planning frameworks



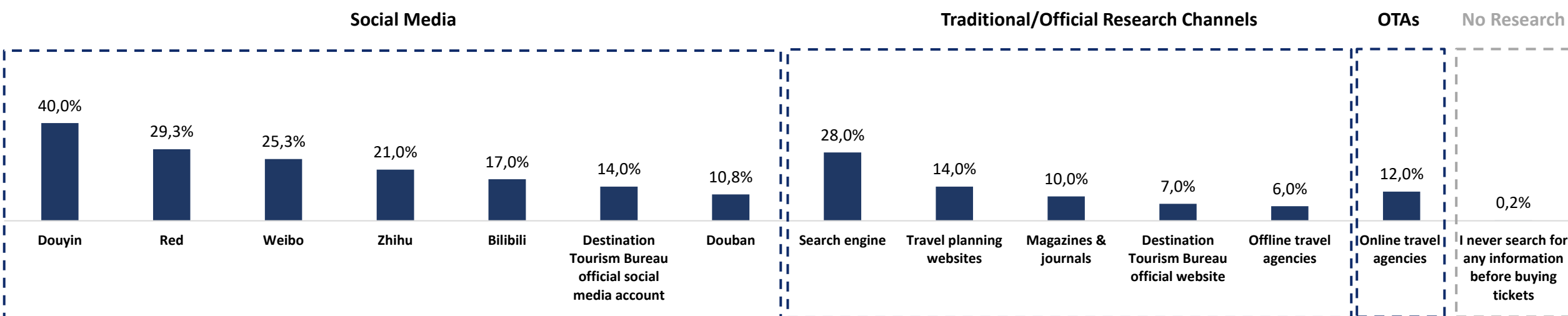
Site recommendations

Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)  
Analysis based on: Q4.2

RESEARCH & DECISION-MAKING PROCESS (CHANNELS, SELECTION CRITERIA) - RESEARCH CHANNELS & CONTENT

# Males more often turn towards textual, informative content to construct trip itineraries, while females prefer using visual documentaries to make their decision

Channels to search for outbound travel related information (n=600, multiple choice)



| Proportion | Content Type                                   | Gender Preference               |
|------------|--|---------------------------------|
| 46%        | Local activities & events                      | Chosen by more <u>females</u> ♀ |
| 42%        | Infographic on travel destinations/attractions | Chosen by more <u>males</u> ♂   |
| 40%        | Travel Tips                                    | Chosen by more <u>females</u> ♀ |
| 28%        | Travel Vlogs                                   | Chosen by more <u>females</u> ♀ |

| Proportion | Content Type                                   | Gender Preference               |
|------------|--|---------------------------------|
| 27%        | Niche Destination / Attraction recommendations | Chosen by more <u>females</u> ♀ |
| 22%        | Travel Journals                                | Chosen by more <u>males</u> ♂   |
| 7%         | Travelling on a budget 穷游                      | Chosen by more <u>males</u> ♂   |

Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)  
 Analysis based on: Q4.3, Q4.4, 1.1, Q4.4+Q1.2, Q4.4+Q5.4

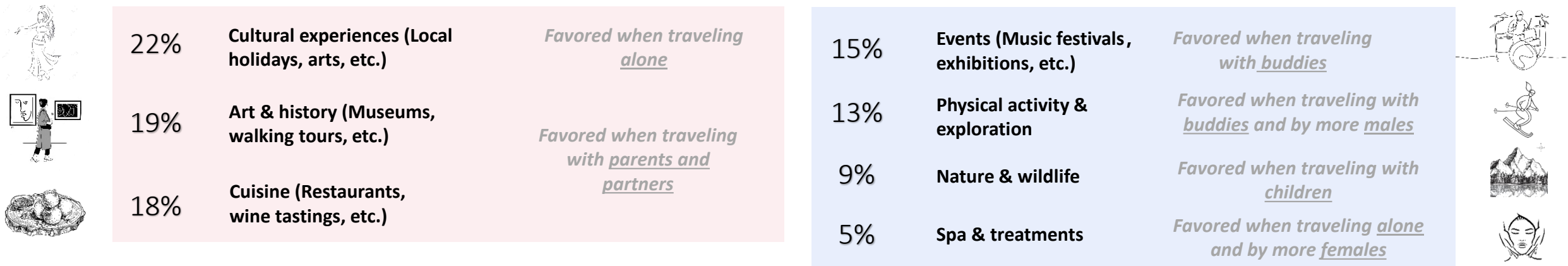


RESEARCH & DECISION-MAKING PROCESS (CHANNELS, SELECTION CRITERIA) - DECISION-MAKING CRITERIA

**Overall, young travelers seek out thrills and physical experiences, while older audiences prefer more leisurely**

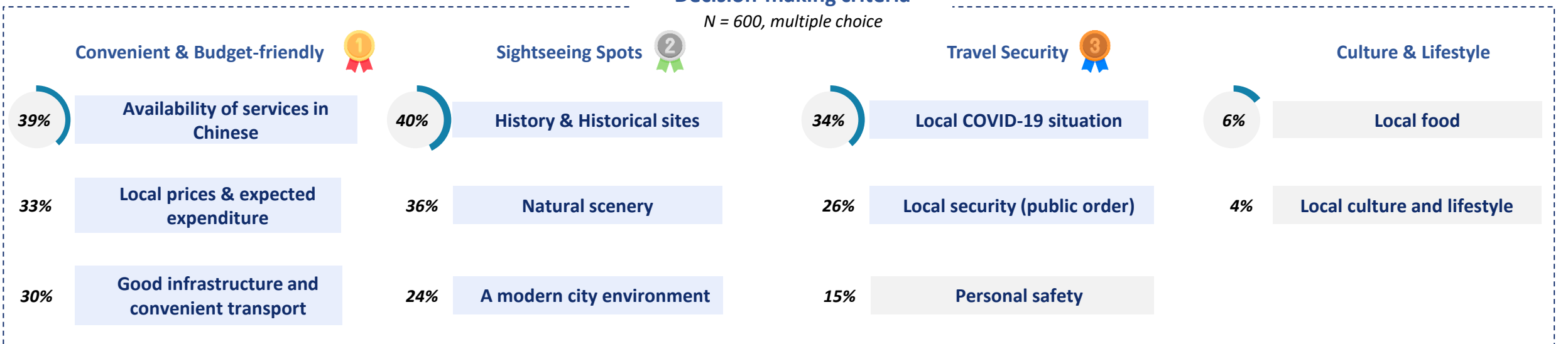
**Most Attractive Local Specialties**

N = 600, multiple choice up to 3



**Decision-making criteria**

N = 600, multiple choice



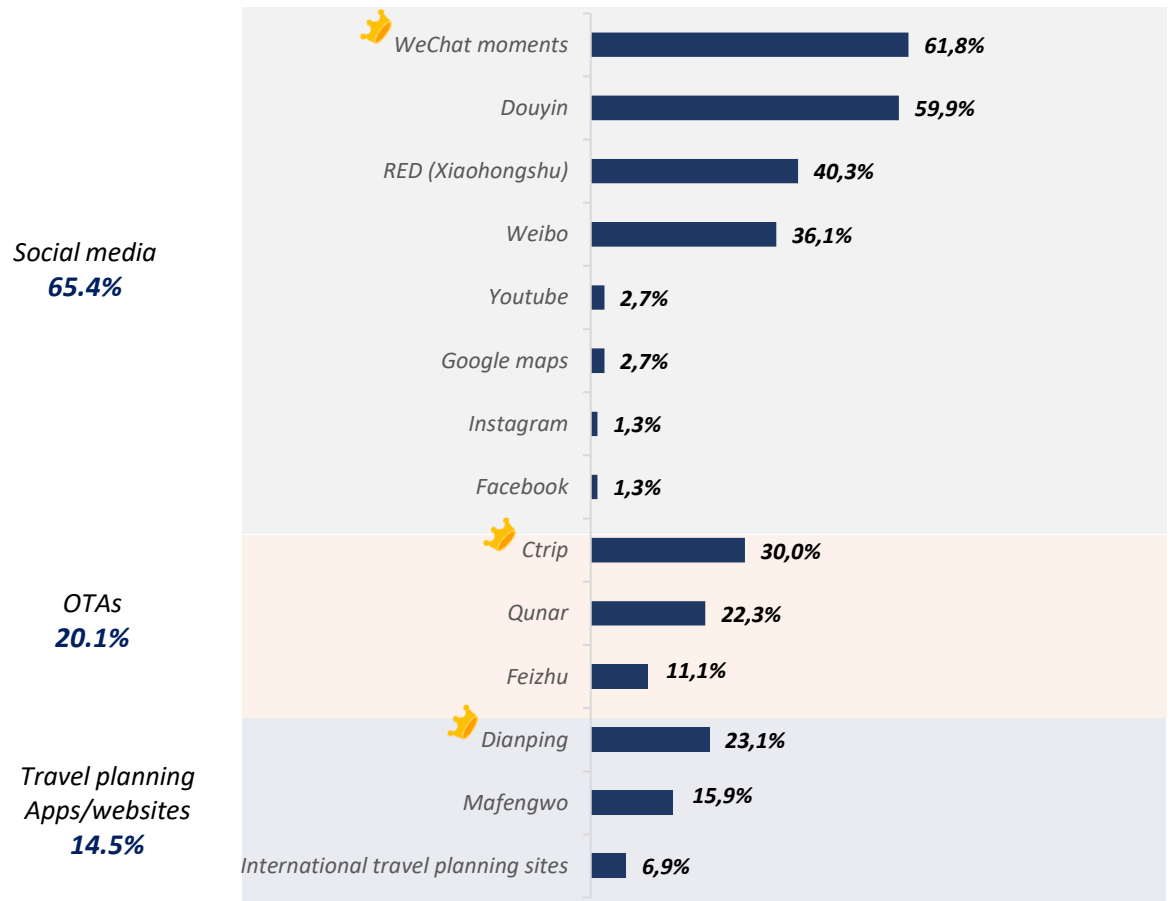
POST-TRIP SHARING

**Most post-trip sharing is done through social media, though travel-related platforms also take a significant share; posts shared consist mostly content that can best represent the uniqueness & specialties of the destination**

**62.8%** *People have shared the travelling experiences online*

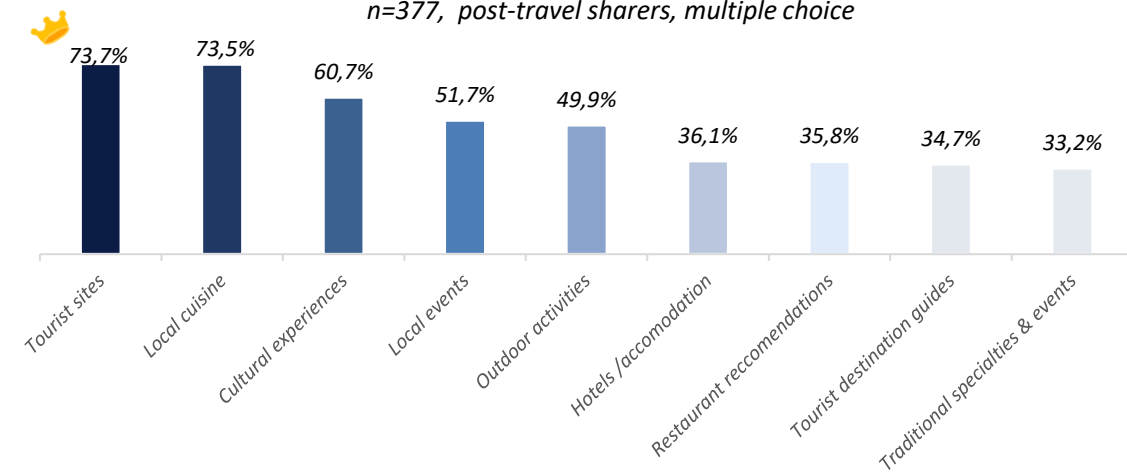
**Online platforms used for sharing travelling experience**

*n=377, post-travel sharers, multiple choice*



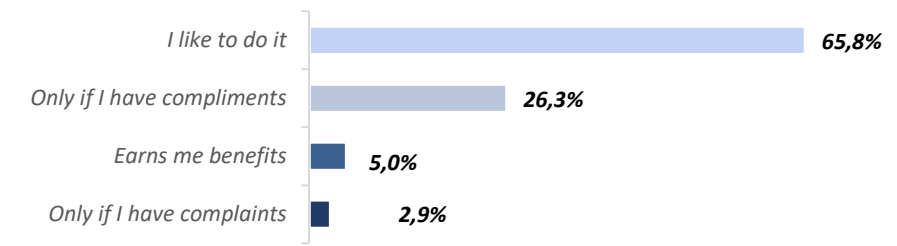
**Post-trip Sharing Content**

*n=377, post-travel sharers, multiple choice*



**Main reasons for sharing**

*n=377, post-travel sharers, single choice*



Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)  
Analysis based on: Q4.7, Q4.8, Q4.9+Q4.10

# 06

## INTERNATIONAL TOURISM MOTIVATIONS & PREFERENCES OF CEE TRAVELERS AFTER REOPENING

### 1) Top destinations after reopening

- *Willingness for international travel in the next 3 years Q5.1*
- *Willingness for travelling C. or E. European countries Q5.2*

### 2) Poland retour

- *Reasons for Polish re-visitation Q5.3*

### 3) Travel Partner x Travel Type after reopening

- *Travelling partner for future international tourism Q5.4*

### 4) Concerns about travel to C. or E. Europe and concern elimination

- *Factors influencing not to visit CEE countries Q5.5*
- *Factors alleviating travel concerns to CEE countries Q5.6*

TOP DESTINATIONS AFTER REOPENING - EUROPEAN TRAVEL PREFERENCES

**Germany, Austria, and Czech Republic are top-ranked destinations in C. and E. Europe after reopening; Luxembourg and Lithuania are popular among young Chinese on social media for their trendy ‘niche’ images as travel destinations**

The Most Potential Destinations After Reopening

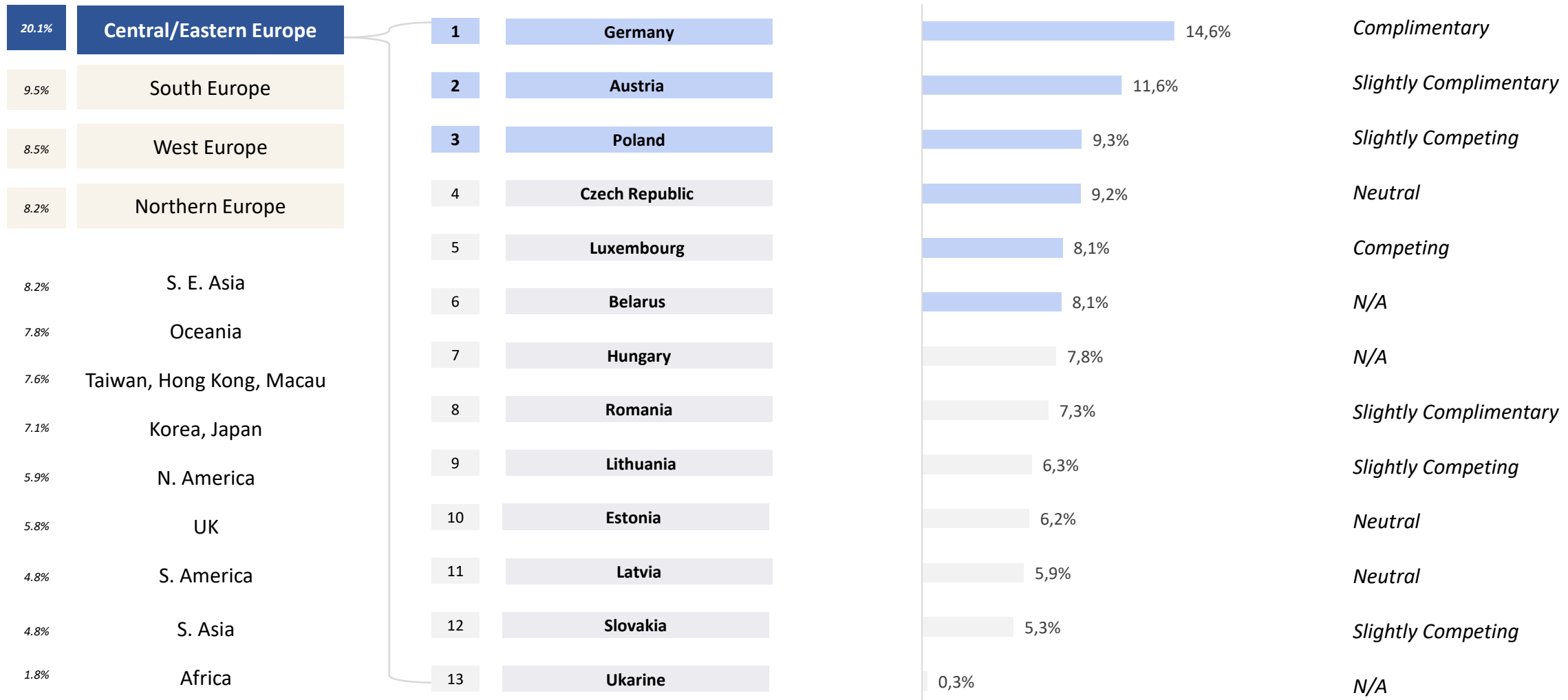
Top C. and E. European Countries After Reopening

% of Total Tourists' Destination of Choice

Competing/Complimentary Relationship

N = 600, multiple choice

N = 600, multiple choice



Source: Online survey conducted in Mainland China by Daxue Consulting in April 2023 (sample size: n= 600)

Analysis based on: Q5.1

POLAND RE-TOUR

**Over a third of Polish travelers plan on returning in the next 3 years; most are interested in having a leisurely, relaxing vacation where they can sightsee and enjoy the local culture and cuisine**

**35%**

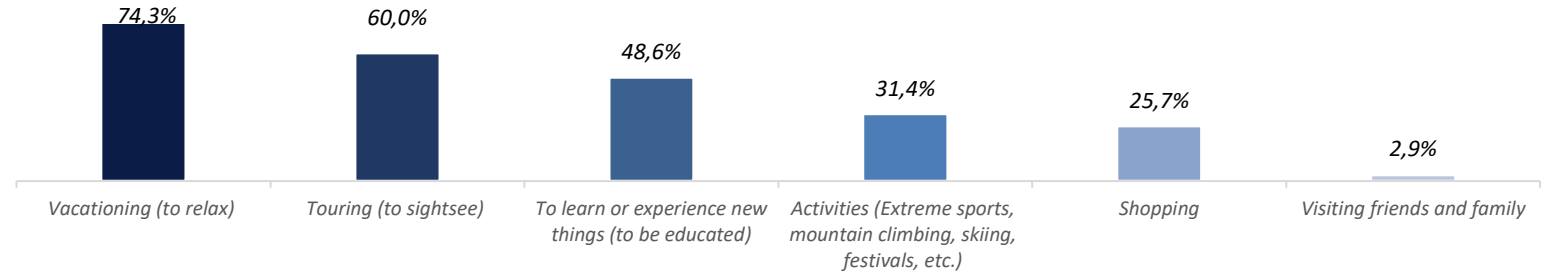
*People wish to revisit Poland in the next 3 years*

**“Why do you wish to visit Poland again?”**

Visiting friends  
 The food  
 The local sights  
**The beautiful scenery**  
 The vibe  
 The culture  
 Fresh air  
 Impressed by the place last time

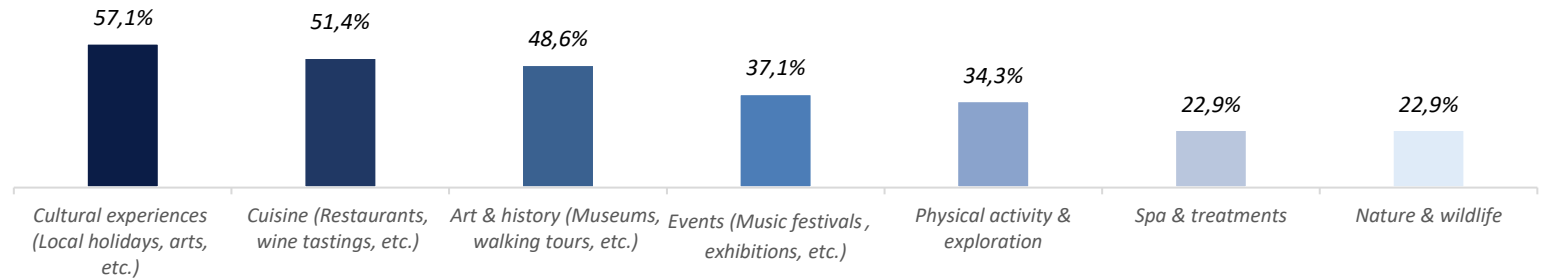
**Which type of travelers are more likely to revisit Poland?**

**Distribution of travel purposes by the willingness to revisit Poland**  
*n=35, Poland revisitors, open question*



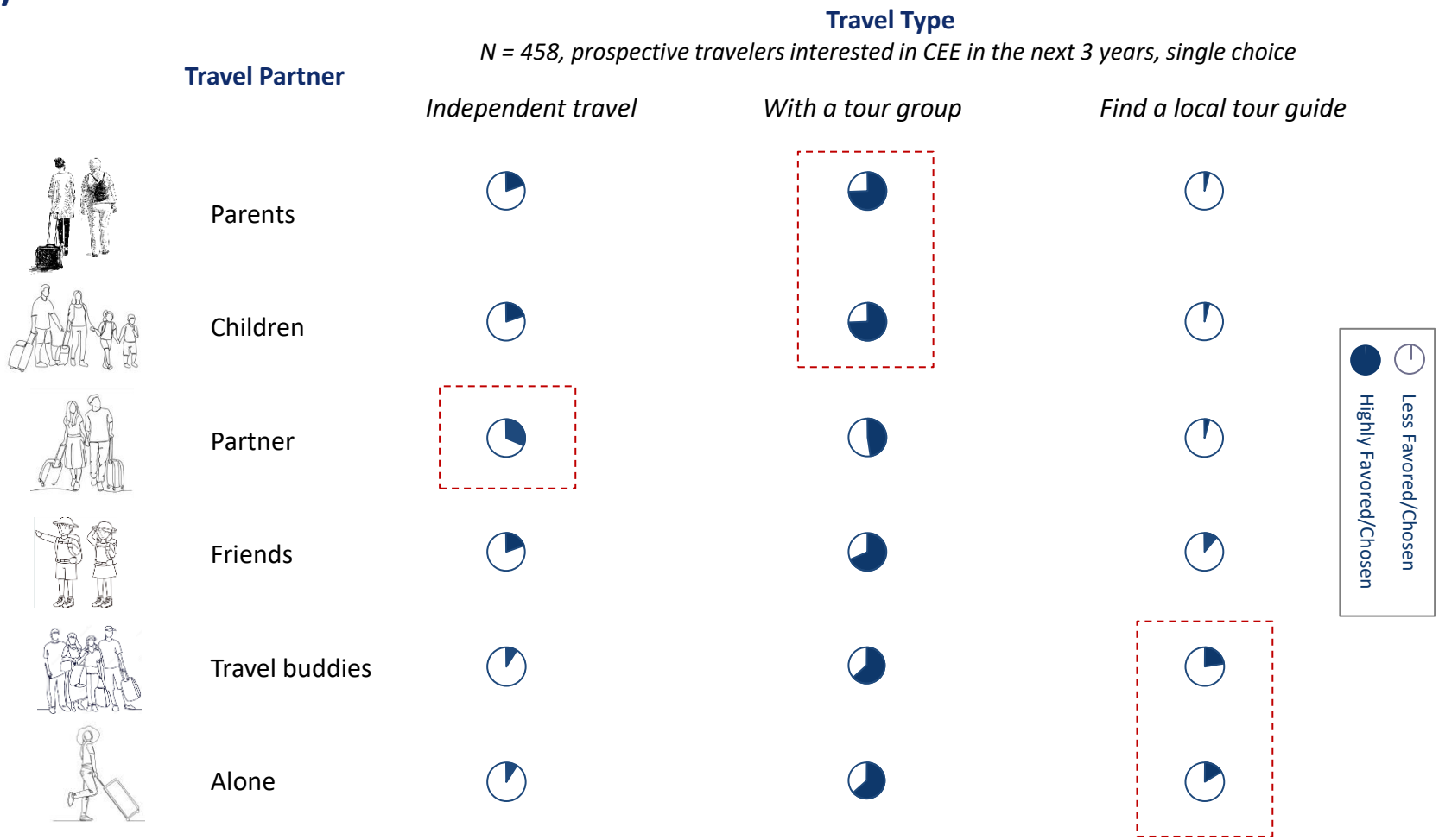
**Distribution of the local specialties they're interested in by the willingness to revisit Poland**

*n=35, Poland revisitors, multiple choice up to 3*



TRAVEL PARTNER × TRAVEL TYPE AFTER REOPENING

**Overall, group travel is preferred by all traveler types, in particular, those traveling as a family; travelers with fewer people in their party, such as partners or lone travelers, tend to travel more independently so they can have to freedom to go wherever they want**



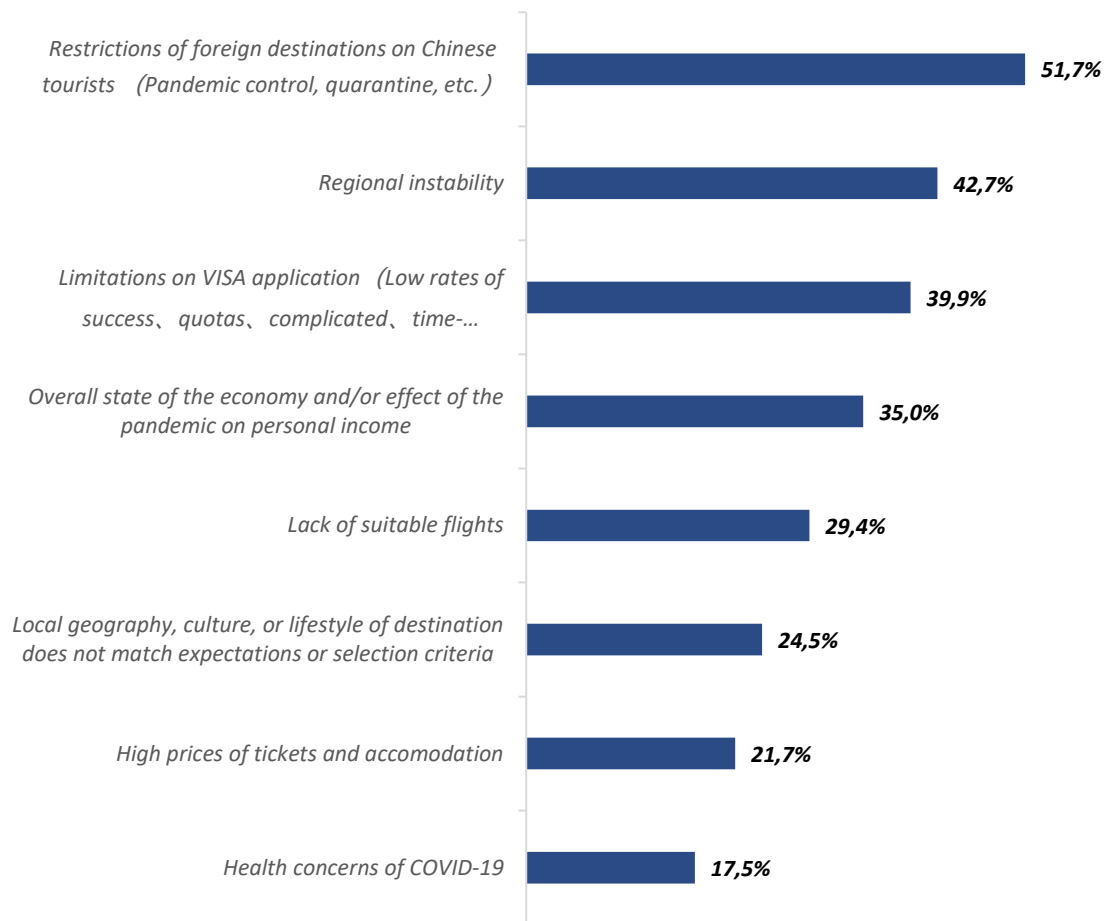
- With parents and children, group tours are preferred to ensure safety. Being in a Chinese tour group also makes children and older tourists a sense of familiarity.
- Those who travel with partners are more likely to travel independently, as they wish to explore the new country on their own in a more romantic setting.
- Those traveling alone or with travel buddies are more likely to hire local tour guides, as they are typically travel enthusiasts who wish to have a truly local, immersive experience, but do not wish to be hampered by the strict itinerary that comes with the group tour.

CONCERNS ABOUT TRAVEL TO C. OR E. EUROPE AND CONCERN ELIMINATION

**Travel restrictions and personal safety remain the two biggest factors barring visitors from visiting C. and E. Europe; while reduced income is a concern, low travel costs do not alleviate this concern as this group does not plan to travel out of the country**

**Concerns about travel to C. or E. Europe Countries**

*N = 142, travelers unsure about visiting CEE in the next three years, multiple choice*



**Concern Elimination**

*N = 143, multiple choice*



## Target Persona - CEE Traveler Profile (1/2)

### CEE TRAVELER PROFILE IN NUMBERS

Outbound CEE travelers are used to traveling **twice a year** (without considering the epidemic)

**50%**

VS. Polish travelers **43%**

Overseas trip length is between **5-15 days**

**80%**

VS. Polish travelers **90%**

CEE travelers have an annual income between **150K and 300K RMB**

**48%**

*\*wealthier than the average outbound traveler*

Are used to travel for **relax and sightseeing**

**>70%**



**78%**

Aged between **20-44**

*\* People younger than 20 years and older than 60 years were screened out*

VS. Polish travelers **69%**

**87%**

Spent **10-30k RMB** on CEE trip

**86%**

Opt for a trip to Central and Eastern Europe with their **partners**

VS. Polish travelers **82%**

**80%**

Chose **group tour** to Central and Eastern Europe

VS. Polish travelers **70%**



## Target Persona - Outbound Traveler Behavior and Psychographics (2/2)

### TOP 3s My Journey from Start to Finish



#### 1. Increase

exposure and marketing of sites with historic architecture and/or with historic significance.

#### 2. Invest

in the showcase of local culture & specialties (e.g., traditional attire, cuisine, festivals).

#### 3. Leverage

Morskie Oko's rise in popularity as a gateway to introduce some of Poland's more natural attractions.

#### 4. Take advantage

of tourists' habit of using official accounts to find inspiration for destinations by optimizing content generation on official accounts.

#### 1. Leverage official accounts

to release the latest information on travel restrictions (e.g., abolition of the need for PCR tests, and decrease in flight prices) to keep visitors informed.

#### 2. Optimize

the experience of Chinese tourists by implementing more Chinese-friendly utilities, such as WeChat and Alipay, Chinese signs, and especially Chinese menus (a pain point reflected on social media).

#### 3. Be aware

of the situation in Ukraine. Currently, the conflict has not had a significant impact on European destinations aside from Ukraine itself but the factor of regional stability is highly valued.

#### 1. Popularize

and standardize hashtags & names of locations & cuisine on social media to aid in the algorithm and increase exposure.

#### 2. Watch

what locations, events, and types of food are trending on social media to preemptively identify opportunities. Sites don't need large numbers of visitors to trend; Masurian Lakes for example, has less exposure on social media at the moment but there is a high chance that the site will be recommended by Polish travelers.

COMPETITIVE DIFFERENTIATION & ANCHORING WITH NEIGHBORING COUNTRIES

**In the awareness establishment phase of marketing, Poland could anchor with Germany via the concept of ‘Germany PLUS’, leveraging 1) low additional cost: proximity & convenient transportation 2) high additional utility: complementary yet niche/differentiated cultural & culinary experience**

**Mapping of Key Points of Competition**

| Country           | Geographical Proximity | Similar Sights | Different Sights | Infrastructure | Niche Destination | Famous | Natural Environment | Cuisine | Accommodation | Convenience of Sites |
|-------------------|------------------------|----------------|------------------|----------------|-------------------|--------|---------------------|---------|---------------|----------------------|
| Russia            |                        |                |                  |                |                   |        |                     |         |               |                      |
| Czech Republic    |                        |                |                  |                |                   |        |                     |         |               |                      |
| Romania           |                        |                |                  |                |                   |        |                     |         |               |                      |
| Belarus           |                        |                |                  |                |                   |        |                     |         |               |                      |
| Luxembourg        |                        |                |                  |                |                   |        |                     |         |               |                      |
| Estonia           |                        |                |                  |                |                   |        |                     |         |               |                      |
| Greece            |                        |                |                  |                |                   |        |                     |         |               |                      |
| Netherlands       |                        |                |                  |                |                   |        |                     |         |               |                      |
| Norway            |                        |                |                  |                |                   |        |                     |         |               |                      |
| <b>Challenges</b> |                        |                |                  |                |                   |        |                     |         |               |                      |

**Poland is not as competitive in natural sites**

=> Focus on marketing sites with globally-relevant historical significance as a means of differentiation (e.g. Baroque, Gothic buildings); as a two-part solution, the former being a short-term strategy, and the latter being long-term.

=> Initiate/sponsor more culture-based experiences friendly to CN travelers increases differentiation with more urbanized destinations like Berlin fulfills the rising need of European tourists for culture-centric trips.

**Mapping of Key Points of Cooperation**

| Country              | Geographical Proximity | Similar Sights | Different Sights | Easy Transport Between Dest. | Package Tour Deal |
|----------------------|------------------------|----------------|------------------|------------------------------|-------------------|
| Germany              |                        |                |                  |                              |                   |
| Austria              |                        |                |                  |                              |                   |
| Hungary              |                        |                |                  |                              |                   |
| Luxembourg           |                        |                |                  |                              |                   |
| Ukraine              |                        |                |                  |                              |                   |
| Sweden               |                        |                |                  |                              |                   |
| Finland              |                        |                |                  |                              |                   |
| <b>Opportunities</b> |                        |                |                  |                              |                   |

**Key Observation #1: Germany is a key anchor** but slightly lacking in site differentiation.

**Key Action #1: Take advantage of Germany’s popularity by focusing on differentiation** and prioritize the goal of cementing it as a key anchor.

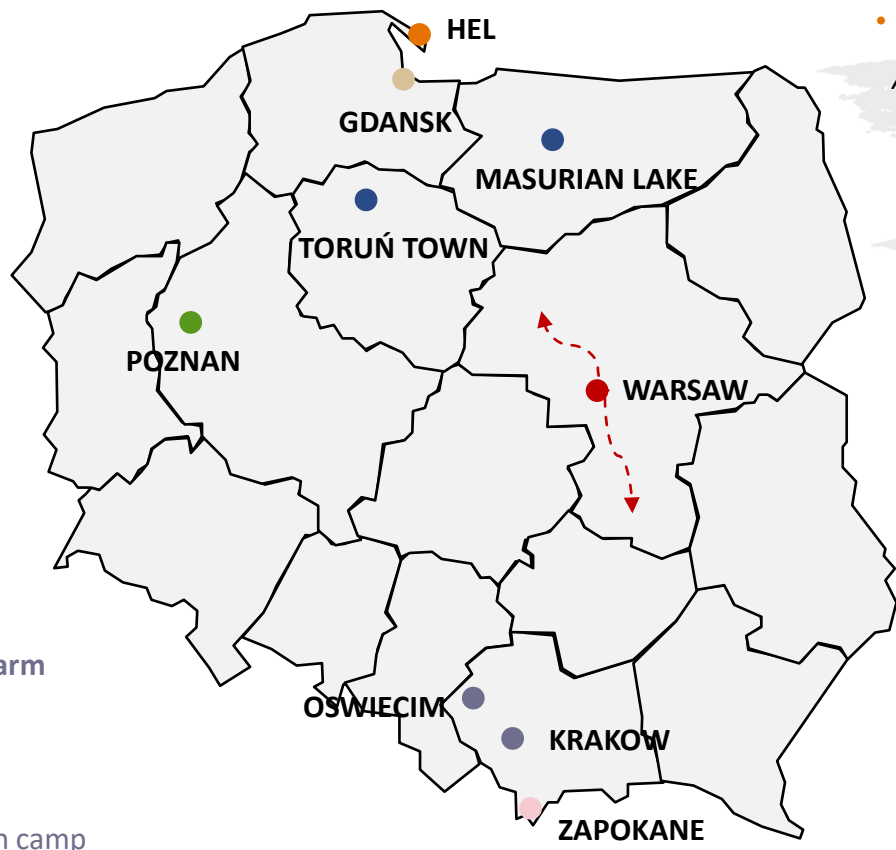
**Polish cuisine is strongly appreciated by real visitors but is largely unknown**

those who have been see cuisine as a key positive experience, yet those who haven’t been have little info on what is good.

=> **Repost, tag, and promote food reviewers who have been to Poland** through official accounts to increase awareness of Polish food through the key touchpoint of social media.

RECOMMENDED PORTFOLIO OF TOURIST ATTRACTIONS IN POLAND

**Recommended tourist attractions in Poland need to be promoted by season and city, emphasizing the differentiation of cities and the comprehensiveness of attraction portfolio. Warsaw, the capital, is a must-visit. Gdansk is ideal for romantic getaways. Niche explorers can target sport-based destinations and classic attractions are still popular for group tours**



**Romantic baroque coastal city**

- Gdansk old town
- Gdansk amber museum



Couple Traveler

*Building Nirvana*

**Poznan, the vibrant city of colors**

- Historic buildings
- Gdansk amber museum
- Local food specialties



Independent Travel

*The culinary city*

**Krakow, with historical charm**

- Wawel Castle
- Krakow old town
- Auschwitz concentration camp
- Wieliczka salt mine



Group Travel



Family Travel

*Cultural journey*

**Beach, sun, and vacation**

- Water sports

*A relaxing, self-recharging vacation destination*



With travel buddies

**Fresh air and natural scenery for sightseeing**

*Kayaking experience, and enjoying the healing scenery along the way*



Group Travel

**Historic and romantic Warsaw**

- Warsaw old town
- Chopin Concert

*A collision of tradition and urban modernity, a journey of art and culture*

**Skiing adventure – A niche snow sports destination**

- Zapokane skiing

*Winter vacation destination, paradise for skiing enthusiasts, beautiful snow scenery*



With travel buddies

COMMUNICATION STRATEGY - TOUCHPOINTS

**Anchoring both competitive & complementary tourism destinations on local social media like Red and Douyin helps Poland accelerate its awareness building. In particular, visual and infographic info (e.g., travel tips, building, dining, Vlog) work better on Red, while showcasing travel activities (e.g., cultural events, sports) through short videos gain better traffic on Douyin.**

**Key Inspirational Channels**

**Key Research Channels**

More used by people aged between **20-27 Y.O.**

99% of Chinese people are used to do research before a travel



*Travel Vlogs*

*Seasonal local activities & events*

*Travel Tips*

*Infographic niche destination exploration*

*In-depth travelling to explore local cultural experience*

*Nature & Art & History*

*Family travel*

*Extreme activities*

*With travel buddies*

*Music festivals & exhibitions*

*Solo Traveler*

*Local Covid-19 situation*

*Local food*

*Well-known or must-see tourist attractions*

*Group Travel*

*Local prices/expenditure*

*Transportation*

*Cultural events & activities*

*Independent Travel & With Local Tour Guide*

## COMMUNICATION STRATEGY – MARKETING MESSAGES



## APPENDIX

### Source list (1/3)

#### Slide 7 - China's outbound tourism overview: Pre-covid & 2023 outlook

- **United Nations World Tourism Organization**  
<https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>
- **Ministry of Culture and Tourism of the PRC**  
<https://www.statista.com/statistics/249702/international-tourism-expenditure-of-chinese-tourists/>  
<https://bw.so-gov.cn/ctaweb/s?tab=all&sitePath=true&siteCode=ctaweb&qt=中国出境旅游发展年度报告>  
<https://www.statista.com/statistics/1068495/china-number-of-outbound-tourist-number/>
- **China Tourism Academy**  
<http://www.travellinkdaily.com/tld/dsj/26097.htm>
- **DW News**  
<https://www.dw.com/en/chinese-tourists-slow-to-return-to-europe/a-64554801>
- **China Outbound Tourism Development Report 2019**  
<http://www.199it.com/archives/921618.html>
- **FlightAI market insight data**  
<http://wap.itxinwen.com/index.php?a=show&catid=29&id=110946>
- **Beijing Municipal Bureau of Culture and Tourism**  
[http://whlyj.beijing.gov.cn/zwgk/zxqs/tjxx/lxscj/202305/t20230508\\_3089558.html](http://whlyj.beijing.gov.cn/zwgk/zxqs/tjxx/lxscj/202305/t20230508_3089558.html)

#### Slide 8 - Top destinations before & After covid

- **Dragontrail**  
<https://dragontrail.com/wp-content/uploads/sites/6/2023/01/January-2023-Chinese-Traveler-Sentiment-Report-Dragon-Trail.pdf>
- **Ministry of Culture and Tourism of the PRC**  
<http://wap.traveldaily.cn/article/137854>

## APPENDIX

### Source list (2/3)

#### *Slide 9 – Top European-specific destinations before covid*

- **China Tourism Academy x Ctrip 2019 H1 China-to-Europe Big Data Report**  
[https://mp.weixin.qq.com/s/e-GpEa8Of6209Jr\\_gLN1A](https://mp.weixin.qq.com/s/e-GpEa8Of6209Jr_gLN1A)
- **ETC x Ctrip China-Europe 2019 inbound and outbound Travel Report**  
<http://caijing.chinadaily.com.cn/a/201912/06/WS5dea1dd7a31099ab995f01d1.html>

#### *Slide 10 – China's outbound tourism consumer behavior & trends (1/2)*

- **Forward-The Economist Consulting**  
<https://www.qianzhan.com/analyst/detail/220/190919-3ee3b8b0.html>
- **Bloomberg News**  
<https://www.bloomberg.com/news/articles/2023-01-16/5-ways-tourism-needs-to-improve-in-2023-to-attract-chinese-travelers?leadSource=uverify%20wall>
- **Ministry of Culture and Tourism of the PRC**  
<https://bw.so-gov.cn/ctaweb/s?tab=all&sitePath=true&siteCode=ctaweb&qt=中国出境旅游发展年度报告>
- **Dragontrail**  
<https://dragontrail.com/wp-content/uploads/sites/6/2023/01/January-2023-Chinese-Traveler-Sentiment-Report-Dragon-Trail.pdf>
- **TTG Asia**  
<https://www.ttgasia.com/2023/01/24/strong-chinese-interest-in-outbound-travel-with-recovery-accelerating-from-summer-2023/>
- **China.org.cn**  
[http://www.china.org.cn/travel/2023-01/12/content\\_85055376.htm](http://www.china.org.cn/travel/2023-01/12/content_85055376.htm)

## APPENDIX

### Source list (3/3)

Slide 11 – [China's outbound tourism consumer behavior & trends \(2/2\)](#)

- **European Travel Commission**  
<https://etc-corporate.org/chinarecovery2023/>
- **McKinsey**  
[https://www.mckinsey.com/~media/mckinsey/industries/travel%20logistics%20and%20infrastructure/our%20insights/outlook%20for%20china%20tourism%20in%202022%20trends%20to%20watch%20in%20uncertain%20times/outlook-for-china-tourism-in-2022-trends-to-watch-in-uncertain-times.pdf?trk=organization\\_guest\\_main-feed-card\\_reshare\\_feed-article-content](https://www.mckinsey.com/~media/mckinsey/industries/travel%20logistics%20and%20infrastructure/our%20insights/outlook%20for%20china%20tourism%20in%202022%20trends%20to%20watch%20in%20uncertain%20times/outlook-for-china-tourism-in-2022-trends-to-watch-in-uncertain-times.pdf?trk=organization_guest_main-feed-card_reshare_feed-article-content)
- **Zhong guo qian zheng bang (China-based VISA agent)**  
<http://www.jndvisa.com/post/26777.html>
- **Forward-The Economist Consulting**  
<https://www.qianzhan.com/analyst/detail/220/190919-3ee3b8b0.html>


















Slide 12: [Outbound traveler demographics before COVID](#)

- **Forward-The Economist Consulting**  
<https://www.qianzhan.com/analyst/detail/220/190919-3ee3b8b0.html>
- **World Tourism Cities Federation x Ipsos**  
[Market Research Report on Chinese Outbound Tourist City Consumption 2017-2018.pdf \(wtcf.org.cn\)](#) [See attached PDF file]
- **Ministry of Culture and Tourism of the PRC**  
<https://bw.so-gov.cn/ctaweb/s?tab=all&sitePath=true&siteCode=ctaweb&qt=中国出境旅游发展年度报告>



## APPENDIX – PLATFORM OVERVIEW

### PLATFORMS USED DURING CHINESE TOURISTS’ CONSUMER JOURNEY

|                       |   | Platform      | Short Description  |
|-----------------------|---|---------------|--|
| OTAs                  |    | Ctrip 携程      | A one-stop shop for accommodation reservations, transportation ticketing, package tours, and other travel-related services in China.             |
|                       |    | Qunar 去哪儿网    | A travel search engine platform for flights, hotels, travel packages, group-buying deals, and other travel-related information.                  |
|                       |    | Fliggy 飞猪     | A travel services platform of Alibaba Group including air tickets, hotels, visa services, vacation & shopping experiences.                       |
| Social Media          |    | Weibo 微博      | A microblogging platform similar to Twitter for sharing quick and easily-digestible content.   |
|                       |    | WeChat 微信     | China’s biggest messaging platform; has other functions such as official accounts for articles and moments for sharing experiences with friends. |
|                       |    | RED 小红书       | Photo-based content sharing platform, currently the most popular channel for users seeking all manners of recommendations or references.         |
|                       |    | Douyin 抖音     | Short-video-based platform, similar to TikTok, more so used for visual references and entertainment.   |
| Travel Planning Sites |    | Dianping 大众点评 | A rating-based review platform that also acts as a semi-social media channel, giving users opportunities to post standalone content and reviews. |
|                       |    | Mafengwo 马蜂窝  | A travel-based social platform where users follow each other and share their journeys, travel guides, and recommendations.                       |
| Forums                |    | Douban 豆瓣     | An interest-based social networking platform with strong diversified content and driven by user interactions.                                    |
|                       |    | Zhihu 知乎      | A Q&A platform similar to Quora, answers can be very specific and are generally reliable, often used as reference.                               |
| Video Platform        |   | Bilibili 哔哩哔哩 | Video platform similar to YouTube for sharing a variety of content including travel vlogs.   |
| Foreign Channels      |  | Instagram /   | A photo-based social media platform for sharing with close friends, as well as the wider community through use of hashtags.                      |
|                       |  | Youtube /     | A creator-driven video sharing platform.   |
|                       |  | Facebook /    | A social media platform for connecting with personal contacts and viewing news.  |
|                       |  | Twitter /     | A microblogging platform for easily digestible content and news.   |
|                       |  | TripAdvisor / | An online travel information and booking website that has reviews, photographs, and informative forums about various hotels and resorts.         |